

# EXHIBIT C

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| Dev Campaign Manager Portal                 |       |        |        |           |     |      |      |      |         |         |          |       |     |      |
|---|-------|--------|--------|-----------|-----|------|------|------|---------|---------|----------|-------|-----|------|
| Sign Out                                    |       |        |        |           |     |      |      |      |         |         |          |       |     |      |
| Campaigns Reports Administration Tools Help |       |        |        |           |     |      |      |      |         |         |          |       |     |      |
| Today MTD                                   |       |        |        |           |     |      |      |      |         |         |          |       |     |      |
| Campaigns ACD                               |       |        |        |           |     |      |      |      |         |         |          |       |     |      |
| Skill view                                  |       |        |        |           |     |      |      |      |         |         |          |       |     |      |
| Progress Activity Outcomes Reports          |       |        |        |           |     |      |      |      |         |         |          |       |     |      |
|   | Total | Remain | % Done | \$ Charge | CIP | Talk | Wait | Hold | Connect | No Conn | Transfer | Today | MTD | Past |
| Call Center Four                            | 0     | 0      | 0      | 0         | 0   | 0    | 0    | 0.00 | 0       | 0       | 0        | 0     | 0   | 0    |
| Call Center One                             | 1     | 1      | 0      | 0         | 0   | 0    | 0    | 0.00 | 0       | 0       | 0        | 0     | 0   | 0    |
| Las Vegas                                   | 0     | 0      | 0      | 0         | 0   | 0    | 0    | 0.00 | 0       | 0       | 0        | 0     | 0   | 0    |
| New York                                    | 0     | 0      | 0      | 0         | 0   | 0    | 0    | 0.00 | 0       | 0       | 0        | 0     | 0   | 0    |

- Skill view:

| Dev Campaign Manager Portal                 |       |        |        |           |     |      |      |      |         |         |          |       |     |      |
|---|-------|--------|--------|-----------|-----|------|------|------|---------|---------|----------|-------|-----|------|
| Sign Out                                    |       |        |        |           |     |      |      |      |         |         |          |       |     |      |
| Campaigns Reports Administration Tools Help |       |        |        |           |     |      |      |      |         |         |          |       |     |      |
| Today MTD                                   |       |        |        |           |     |      |      |      |         |         |          |       |     |      |
| Campaigns ACD                               |       |        |        |           |     |      |      |      |         |         |          |       |     |      |
| Skill view                                  |       |        |        |           |     |      |      |      |         |         |          |       |     |      |
| Progress Activity Outcomes Reports          |       |        |        |           |     |      |      |      |         |         |          |       |     |      |
|   | Total | Remain | % Done | \$ Charge | CIP | Talk | Wait | Hold | Connect | No Conn | Transfer | Today | MTD | Past |
| Attended Whizzer 1                          | 0     | 0      | 0      | 0         | 0   | 0    | 0    | 0.00 | 0       | 0       | 0        | 0     | 0   | 0    |
| Attended Whizzer 2                          | 0     | 0      | 0      | 0         | 0   | 0    | 0    | 0.00 | 0       | 0       | 0        | 0     | 0   | 0    |
| CCS Unattended List 1                       | 0     | 0      | 0      | 0         | 0   | 0    | 0    | 0.00 | 0       | 0       | 0        | 0     | 0   | 0    |

The information available on the main page summarizes real time skill activity.

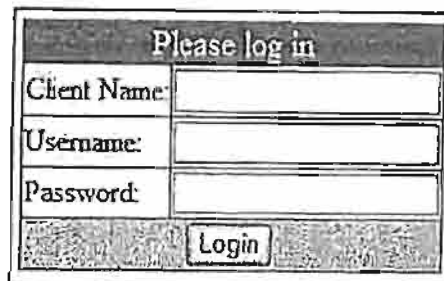
This information includes:

- **Total** - Total calls loaded to the skill
- **Remain** - Calls remaining to be launched in the skill or call center
- **% Done** - Percent of calls completed ("% done")
- **\$ Charge** - Charges associated with each skill or call center
- **CIP** - Current calls in progress (CIP)
- **Talk** - Current talking calls (calls currently connected to agents)
- **Wait** - Current calls waiting (calls in queue)
- **Hold** - The longest single hold duration for a call in the queue
- **Connect** - Real time aggregate of connected calls
- **No Conn.** - Calls that terminated in no connection
- **Transfer** - Total number of successful agent transfers
- **Reporting links** – Links to Today, MTD and Past reports

## LIVEVOX – USER LOGIN

To login to the LiveVox system:

- Go to your custom URL that was provided by LiveVox  
<https://www.livclient.com/ClientName/Voiceportal>
- Enter Client Name (provided by Livevox)
- Enter username (Login ID)
- Enter password
- Click the 'Login' button




*Username and password are case sensitive*

*With the password management functionality enabled, the following also applies:*

- User passwords must be a minimum of eight alpha-numeric characters length and must be different from the last 3 passwords used for that user.
- User passwords expire after a specified period of time, defaulting at 90 days.
- Three failed login attempts lock out users. Follow the instructions in section 4.5 to unlock a user.

Upon logging in, you will be brought to the main screen where you can see all skills.



*A skill is a predefined shell where you can set attributes such as script, call flow, phone numbers, and pacing. The skill is what the agents log into to receive calls that their username has access to. The LiveVox agent grouping hierarchy can be viewed as follows: Enterprise → Call Center → Skill → Campaign → Agent.*

You can view basic dialling result information for each of the skills from the main screen, or drill down to individual skill pages to access detailed information by clicking skill names under each active call center.

- Call center view:

### 3.9 DRG and Classification Call Routing Options - LiveVox Voice Portal

Page 3 of 3

#### Related Topics

Agent Setup

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PA8

- *"Longest Available Agent" is the default mode. This setup must be changed in order to ensure another selection.*
- *"Strict classification" - when there are no agents logged in with the proper classification in inbound blending, system can be setup to play either a no answer message, or transfer the call to the voicemail number. Outbound calls can only utilize the no answer phrase.*

- Call Priority



*Call Priority is considered only if the call is placed into a queue due to no agents with proper classification being available. If agent with proper classification is available, Call Priority will have no impact on routing of the call.*

- LiveVox supports up to 100 levels of call priority.
- By default the priority is set to 100.
- If priority is set outside of the supported values, the call will receive the default priority of 100.
- Calls with lower priority values are transferred ahead of calls with higher priority value (E.g. Calls with priority 1 will always transfer before calls with priority 2).
- If two calls have same priority, they are routed based on first in, first out.

Priorities can be set for one of these templates: A\_MASTER\_1, A\_MASTER\_2 and INB\_A\_XFER\_4 via the Message Editor in the Config. Mgr.

## DRG AND CLASSIFICATION CALL ROUTING OPTIONS

The following routing configuration options are available:

- Agent selection (routing target) settings available via Dynamic Resource Group (DRG)
  - *Longest Available Agent* – If no agents with the proper classification are available to take the call it will be transferred to the longest available agent in the same resource group regardless of classification.
  - *Strict Classification* – If no agents with the proper classification are available to take the call the call is put on hold until an agent with proper classification becomes available. Hold time can be configured in the template. Once the maximum hold time is reached, the call will be terminated.
  - *Strict Classification with Overflow* – If no agents with the proper classification are available to take the call it will be put on hold until the maximum hold time (configured in the template) is reached. At this time the system will expand the target selection to include all agents in the DRG and the call will be bridged to the longest available agent. If no agents are available, the system will continue searching until one becomes available (no more max hold time action).

| Name          | Type                    | Enabled |
|---------------|-------------------------|---------|
| ACD 2.4 DRG_1 | STRICT_CLASSIFICATION   | true    |
| ACD 2.4 DRG_2 | STRICT_OVERFLOW         | true    |
| ACD 2.4 DRG_3 | LONGEST_AVAILABLE_AGENT | true    |

By selecting the desired resource group in ACD and pressing the 'Edit' option rollover type can be changed.

Resource Group List

<< first < prev 1 next > last >>

| Name  | Type                    | Enabled |
|-------|-------------------------|---------|
| 17451 | LONGEST_AVAILABLE_AGENT |         |
| 17452 | STRICT_OVERFLOW         |         |
| 17453 | STRICT_OVERFLOW         |         |
| 17454 | STRICT_OVERFLOW         |         |
| 17455 | STRICT_OVERFLOW         |         |
| 17456 | STRICT_OVERFLOW         |         |
| 17457 | STRICT_OVERFLOW         |         |
| 17458 | STRICT_OVERFLOW         |         |
| 17459 | STRICT_OVERFLOW         |         |
| 17460 | STRICT_OVERFLOW         |         |
| 17461 | STRICT_OVERFLOW         |         |
| 17462 | STRICT_OVERFLOW         |         |
| 17463 | STRICT_OVERFLOW         |         |
| 17464 | STRICT_OVERFLOW         |         |
| 17465 | STRICT_OVERFLOW         |         |
| 17466 | STRICT_OVERFLOW         |         |
| 17467 | STRICT_OVERFLOW         |         |
| 17468 | STRICT_OVERFLOW         |         |
| 17469 | STRICT_OVERFLOW         |         |
| 17470 | STRICT_OVERFLOW         |         |
| 17471 | STRICT_OVERFLOW         |         |
| 17472 | STRICT_OVERFLOW         |         |
| 17473 | STRICT_OVERFLOW         |         |
| 17474 | STRICT_OVERFLOW         |         |
| 17475 | STRICT_OVERFLOW         |         |
| 17476 | STRICT_OVERFLOW         |         |
| 17477 | STRICT_OVERFLOW         |         |
| 17478 | STRICT_OVERFLOW         |         |
| 17479 | STRICT_OVERFLOW         |         |
| 17480 | STRICT_OVERFLOW         |         |
| 17481 | STRICT_OVERFLOW         |         |
| 17482 | STRICT_OVERFLOW         |         |
| 17483 | STRICT_OVERFLOW         |         |
| 17484 | STRICT_OVERFLOW         |         |
| 17485 | STRICT_OVERFLOW         |         |
| 17486 | STRICT_OVERFLOW         |         |
| 17487 | STRICT_OVERFLOW         |         |
| 17488 | STRICT_OVERFLOW         |         |
| 17489 | STRICT_OVERFLOW         |         |
| 17490 | STRICT_OVERFLOW         |         |
| 17491 | STRICT_OVERFLOW         |         |
| 17492 | STRICT_OVERFLOW         |         |
| 17493 | STRICT_OVERFLOW         |         |
| 17494 | STRICT_OVERFLOW         |         |
| 17495 | STRICT_OVERFLOW         |         |
| 17496 | STRICT_OVERFLOW         |         |
| 17497 | STRICT_OVERFLOW         |         |
| 17498 | STRICT_OVERFLOW         |         |
| 17499 | STRICT_OVERFLOW         |         |
| 17500 | STRICT_OVERFLOW         |         |

17451 Edit Resource Group X

Name: 17451\_RESOURCE\_GRP

Type: LONGEST\_AVAILABLE\_AGENT

Enabled: ☒

Submit Cancel

Refresh Edit





Proficiency level 1 = highest and Proficiency Level 5 = lowest

Agent Classification Resource Group

### Classification vs Agent Mapping

Classification:  Proficiency:

| Available Agents | Assigned Agents    |
|------------------|--------------------|
| ACE28            | CAV_GAVD (level 5) |
| ALEXALEXALEX     | DEMO (level 1)     |
| ANTHONY          | JOEDEM02 (level 1) |
| BALA             | RUTEST (level 2)   |
| BALA_TEST        |                    |
| CAV_GL           |                    |
| CAV_KRIS         |                    |
| CAV_LS_NEW       |                    |
| CLARK            |                    |
| CVTEST/R         |                    |
| DEMO2_WWALDHEIM  |                    |
| DEMO_TEST        |                    |
| DUORRS_LV        |                    |
| EUTEST           |                    |
| ENTERHOUZII      |                    |
| CAJE             |                    |
| COLAPP           |                    |
| GL_CAVALRY       |                    |
| OSCHNYGEL        |                    |
| JASON_CAVALRY    |                    |
| JOEDEM02         |                    |
| JOEDEM0C         |                    |
| JOEDEM0C2        |                    |
| JOEDEM0C3        |                    |
| JOEDEM0C4        |                    |
| JOEDEM0C5        |                    |
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| JOEDEM0C99       |                    |
| JOEDEM0C100      |                    |

Save

#### Related Topics

[Agent Setup](#)

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## AGENT CLASSIFICATION

Agent Classification allows managers to classify agents based on a type of skill the agents may possess, the type of clients they handle, or their proficiency (level of expertise) handling the calls. For example, managers may assign classifications based on multi-language capabilities or strong collection experience and link them to accounts that require these qualifications.



*This feature needs to be requested. Classification groups are currently pre-defined and controlled through the LiveVox backend.*

- When enabled, the Classification tab is available on the ACD page. A Manager will see a list of pre-defined Agent Classifications by choosing "List" (navigate from Classification tab to List).

| Classification  | Description |
|-----------------|-------------|
| GOLD (1022)     | GOLD        |
| PLATINUM (1023) | PLATINUM    |
| SILVER (1021)   | SILVER      |

- All pre-defined agent classifications will have an ID displayed next to their name (as shown above). These ID's can be used when configuring classification through Message Editor in Config. Mgr.
- Managers can sort and refresh the list
- Navigate to mapping by selecting Mapping and choose to assign by agent or by classification.

| Classification  | Description |
|-----------------|-------------|
| GOLD (1022)     | GOLD        |
| PLATINUM (1023) | PLATINUM    |
| SILVER (1021)   | SILVER      |

- Managers are able to:
  - Map an agent to an available classification and assign proficiency 1 through 5.
  - Select the Proficiency level and then select those agents from the Available Agents list and move them to the Assigned Agents list.
  - Save and select another Proficiency level and repeat these steps to assign agents at a different level. You cannot assign and save more than one proficiency level at a time.

- Associate by Group or Skill

To "associate" means to map a Resource Group, a group of outbound skills, to an inbound skill. This enables inbound/outbound blending by defining the pool of agents available to an inbound skill. Inbound calls will then be routed to available agents within the resource group.

Associating resource groups to an inbound skill is handled via the arrow keys similar to mapping skills to a resource group or mapping agents to a skill.

#### Related Topics

[Agent Setup](#)

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## 3.7 Resource Grouping

## - LiveVox Voice Portal

Page 2 of 3

**Resource Group vs Skill Assignment Mapping**

Groups:  [M]

**Available Skills**

- ATL\_1stParty\_Inbound\_877560033 (7)
- ATL\_1stParty\_Recovery\_Miscel\_VoP - 1257
- ATL\_1stParty\_Recovery\_Miscel\_VoP - 1257
- Atlanta\_Fin\_Miscel\_Outbound (4)
- Atlanta\_Fin\_Preview\_All\_OC (5)
- Atlanta\_Fin\_OC\_VoP (2)
- Atlanta\_Fin\_RPC (1)
- Atlanta\_Financial\_Services\_Inbound\_877560033 (7)
- Denver\_Inbound\_877560033 (5)
- Denver\_Miscel\_Outbound (4)
- Denver\_Preview\_All\_OC (5)
- Denver\_OC (2)
- Denver\_RPC (1)
- Inactive\_10964\_Miscel\_Sk
- Inactive\_Preview\_All\_OC (15)
- Inactive\_Preview\_Public (7)
- Inactive\_OC\_1 (14)
- Inactive\_OC\_2 (15)
- Inactive\_OC\_3 (15)
- Inactive\_OC\_4 (22)
- Inactive\_RPC\_1 (1)
- Inactive\_RPC\_2 (2)
- Inactive\_RPC\_3 (2)
- Inactive\_RPC\_4 (4)
- Inactive\_RPC\_5 (5)
- Inactive\_RPC\_6 (5)
- Inactive\_RPC\_7 (7)

**Assigned Skills**

- ATL\_1stParty\_Preview\_All\_OC\_Cable\_Ser
- ATL\_1stParty\_Preview\_All\_OC (5)
- ATL\_1stParty\_Preview\_All\_OC\_Survey\_Ser
- ATL\_1stParty\_Preview\_Voice\_OC (5)
- ATL\_1stParty\_Recovery\_Miscel (4)
- ATL\_1stParty\_Recovery\_Miscel\_VoP (15)
- ATL\_1stParty\_Recovery\_OC (2)
- ATL\_1stParty\_Recovery\_RPC (1)
- Inactive
- Inactive\_ATL\_1stParty\_Preview\_All\_OC\_Cable\_Ser

[Save]

- Mapping resource groups by skill

**Skill vs Resource Group Assignment Mapping**

Cell Centers:  [M]

Skills:  [M]

**Available Resource Groups**

- ATL FIN SVCS RO
- DRO\_INBOUND\_20577
- DRO\_INBOUND\_20579
- ENGLISH\_RESOURCE\_GROUP
- RESOURCE\_GROUP\_A
- STARK DRO

**Assigned Resource Groups**

- ATL 1ST PARTY RO
- DENVER SMART MESSAGE

[Save]

PA14

## RESOURCE GROUPING

Agents are able to receive inbound calls while they are simultaneously participating in outbound campaigns. This feature, Call Blending, is enabled by the establishment of a Resource Group, which collates agents otherwise segmented into separate skills into a pool of agents able to receive inbound calls. In other words, Resource Group defines which outbound skills agents should be logged into to receive inbound calls, providing a blended ACD environment.

- The "Resource Group" tab is available from the ACD page if there is an active inbound skill Voice Portal.
- From this menu, a manager will be able to see a list of currently defined resource groups

| Name               | Type                  | Enabled |
|--------------------|-----------------------|---------|
| TEST               | LONGEST_AVAILABLE_AGE | Yes     |
| TEST2              | LONGEST_AVAILABLE_AGE | Yes     |
| SMARTMESSAGE_GROUP | LONGEST_AVAILABLE_AGE | Yes     |

- Select Add from the Resource Group dropdown menu to add resource groups.

- Map by Group or Skill – allows user to define skills available to the resource group. This is similar to placing agents in skills, or vice versa. The Inbound skill(s) should be selected in the "Map Inbound" section, and the outbound skill(s) from the "Map Outbound" section (Additional instructions in section 3.9.1). Callers to the inbound skill in the Resource Group will then be routed to agents logged into the outbound skills listed in the Group.

- Mapping resource groups by group.

## AGENT SPECIFIC ROUTING

Inbound calls can be routed to the specific agent that is assigned to an account or to the agent that last spoke to the consumer. Agent-specific routing requires the Agent's ID to be sent in the input file and must match the Agent ID that is added to the Agent ACD grid.

- When agent-specific routing is enabled, the following routing logic is utilized:
  - Call is routed to the agent that is assigned in input file (clients will need to provide this information in the file).
  - If not available, the call is routed to the agent who last spoke with the consumer.
  - If not available, the call is routed to the longest available agent.



*Agent specific routing can be turned ON or OFF at the skill level. The default mode is OFF.*

### Related Topics

[Agent Setup](#)

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## IMPORT

Import feature allows users to import lists of agent profile information.

- To import choose Agent and Import from the main ACD screen.

- Browse to the location of the file you wish to upload.
- Data format is specified on the screen and should be comma delimited.



- If the import function is used for an agent already set up in the system, the system will scrub the file and exclude that Agent except in the following scenario:
- If any other fields are different – password, name spelled differently, the system will overwrite those altered fields.
- To assign agent access to specific skills, you will need to use the LiveVox skill\_id. This information can be found in the Configuration Manager.
- The list of skill IDs can only include up to 12 individual entries. Including a 13<sup>th</sup> skill ID will cause the import to fail. Please see Agent vs. Skill Mapping (section 3.3.1) or Skill vs. Agent Mapping (section 3.3.2) for instructions on how to map agents to skills.

### Related Topics

[Agent Setup](#)

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## Related Topics

### Mapping

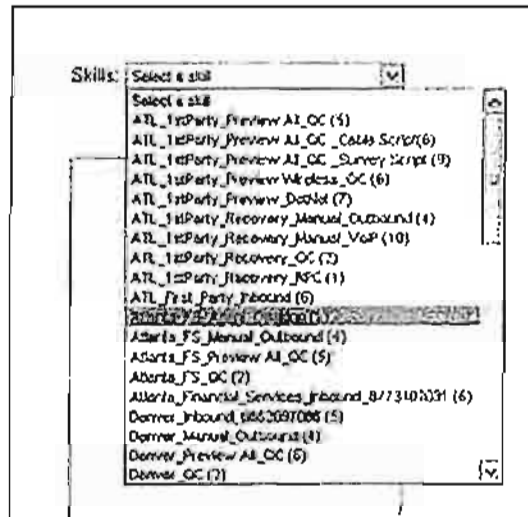
PA19



**BY SKILL (SKILL VS. AGENT MAPPING)**

The following steps describe how to map multiple agents to and from a single skill:

- Choose the appropriate skill via the Skills dropdown list.



- Select the agent or agents in the available agents or assigned agents column by holding the CTRL key and clicking on the specific agents.
- Click on the appropriate arrow key located in the center of the page to move the selected agents.
- Choose 'Save' in the bottom right hand corner. A confirmation window appears when successful.

[https://na3.livexox.com/ccs\\_docs/ccs\\_1.7.3/LiveVoxHelp/topics/ByAgentAgentVsSkillMa...](https://na3.livexox.com/ccs_docs/ccs_1.7.3/LiveVoxHelp/topics/ByAgentAgentVsSkillMa...) 9/27/2013

- Choose the agent or Agent Login ID via the dropdown list.

- Select the skill or skills in the available skills or assigned skills column by holding the CTRL key and clicking on the specific skills.
- Click on the appropriate arrow key located in the center of the page to move the selected skills.
- Choose 'Save' in the bottom right hand corner of the screen. A confirmation window will appear stating the change was successful.

## MAPPING

Mapping is the process of granting an existing agent access to any skill(s) that were not assigned when the agent was created. This can be done by assigning a skill to an agent or an agent to a skill. LiveVox has provided both ways to do this to make the process more efficient.

|  |            |                |                |       |            |        |
|--|------------|----------------|----------------|-------|------------|--------|
| Agent                                      |            | Classification | Resource Group |       |            |        |
| List                                       |            |                |                |       |            |        |
| Add  |            |                |                |       |            |        |
| Update                                     | By Agent   |                |                |       |            |        |
| Export                                     | By Skill   |                |                |       |            |        |
| Import                                     |            | Search         |                |       |            |        |
| Refresh                                    |            |                |                |       |            |        |
| << first < prev 1 2 3 4 5 6 next > last >> |            |                |                |       |            |        |
| Logon ID                                   | First Name | Last Name      | Phone          | Web-S | Home Agent | Active |
| ACER                                       | ALAN       | CHANDRAPAI     | (415) 218-3913 | -1    | yes        | yes    |
| ALEX/ALEX                                  | ALEX       | LIU            | (415) 234-3456 | -1    | no         | yes    |
| ANTHONY                                    | ANTHONY    | WILSON         | (404) 330-7800 | 10    | yes        | yes    |
| BALA                                       | BALA       | KATTA          | (415) 671-6022 | -1    | yes        | yes    |
| BALA_TEST                                  | BALA       | KATTA          | (415) 671-6022 | -1    | yes        | yes    |
| DAVID                                      | DAVID      | MORRIS         | (678) 823-8485 | -1    | no         | yes    |

### Related Topics

[Agent Setup](#)

[By Agent \(Agent vs. Skill Mapping\)](#)

[By Skill \(Skill vs. Agent Mapping\)](#)

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## 3.2 Add (Set up an Agent) - LiveVox Voice Portal

Page 2 of 2

- **Security and Password Management**
  - When enabled by a Sysadmin in the configuration manager, password management features include enforcing proper password robustness, locking account after maximum failed attempts, and enforcing password expiration.
  - The password must be a minimum of 8 characters, containing at least 1 digit and cannot match any of the previous 3 passwords.
- **Unique Agent Check**
  - When adding an agent, verification can be done through the "check availability" option to check if this agent Login ID has been used.
- **Wrap Up**
- Enables configuration of wrap time limits, and can be defined when adding or editing an agent's data. Agents with defined wrap up limits will be placed back into "Not Ready" status after the time elapses. Calls where agents are forced out of wrap will be terminated with a generic "Operator Transfer" result.



*The default value is "-1", which allows agents to remain in wrap up mode until they select a termination code.*

- **Home Agent**
  - Mark "Yes" if the agent uses different work stations/phone extensions in the office or can work remotely from home. They can enter a phone number and have the calls routed accordingly. "No" will not allow the agent to edit where their calls are being routed.
- **Active Agent**
  - Agent can be active or inactive by simply marking the appropriate radio button. Inactive agents have had their account disabled and are moved to the Inactive Agent Screen.
- To choose the skills that an agent has access to click on skills listed in the Skill window. Highlight multiple skills by holding down the CTRL key and clicking with the mouse.
- Click 'Submit'.
- A confirmation window will appear stating the user has been added.
- If an error message is displayed instead of the "Successfully Added Agent" message, correct the indicated field and click "Submit" again.



*Please note that with ACD v. 2.4+ agents are no longer able to log into inbound skills.*

**Related Topics**

[Agent Setup](#)

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PA24

## 3.2 Add (Set up an Agent) - LiveVox Voice Portal

Page 1 of 2

**ADD (SET UP AN AGENT)**

To set up an agent:

- Select Add from the Agent menu.

| Agent   | Classification | Resource Group | First Name | Last Name | Phone          | Wrapup | Home Agent | Active |
|---------|----------------|----------------|------------|-----------|----------------|--------|------------|--------|
| AGENTS  |                |                | ALAN       | CHANDRAN  | (415) 215-3913 | -1     | yes        | yes    |
| ALEX    |                |                | ALEX       | LU        | (415) 224-3456 | -1     | no         | yes    |
| ANTHONY |                |                | ANTHONY    | NALSON    | (404) 538-7208 | 30     | yes        | yes    |

The following screen will be displayed:

**Add Agent**

NEW\_USER is available

Logon ID:

First Name:

Last Name:

Password:

Re-type Password:

Note: password must be at least eight characters long and contains at least one digit

Wrapup Time:

Note: default -1 (unlimited)

Phone Number/Extension:

Home Agent: ☒ Yes ☐ No

Active Agent: ☒ Yes ☐ No

Skill: 

|   |                          |
|---|--------------------------|
| ATL_1stParty_Preview All_QC (5) (18891)             | <input type="checkbox"/> |
| ATL_1stParty_Preview All_QC_Cable Script (8) (2688) | <input type="checkbox"/> |
| ATL_1stParty_Preview All_QC_Survey Script (9) (27)  | <input type="checkbox"/> |
| ATL_1stParty_Preview Wireless_QC (6) (20966)        | <input type="checkbox"/> |

- Enter the Login ID, Password, First Name, Last Name, and the Phone number/Extension for that agent:
  - Agent IDs may only include the following characters: letters a-z, numbers 0-9, underscore ( ) and dot (.)

PA25



## 3.1.1 Active Agents - LiveVox Voice Portal

Page 1 of 1

**ACTIVE AGENTS**

- Navigate to Active agents by selecting the 'ACD' link from the Administration drop down menu from the main Voice Portal menu.

| Login ID | First Name | Last Name | Phone          | Wrapup | Home Agent | Active |
|----------|------------|-----------|----------------|--------|------------|--------|
| LV_JOSE  | JOSE       | BORRIDA   | (416) 814-8720 | -1     | yes        | yes    |
| LV_JORDI | JORDI      | BOREIDA   | (732) 822-5411 | -1     | yes        | yes    |
| LV_JORDI | JORDI      | BOREIDA   | (732) 822-5411 | -1     | yes        | yes    |
| LV_JORDI | JORDI      | BOREIDA   | (732) 822-5411 | -1     | yes        | yes    |

- Options available on Active agents page:
  - Search – Allows to search for an agent by login ID.
  - Edit – Allows you to edit agent information (for details see section 3.2).
  - Refresh – Refreshes the list.

**Related Topics**Agents List

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## **AGENTS LIST**

### **Related Topics**

[Agent Setup](#)

[Active Agents](#)

[Inactive Agents](#)

[Locked Agents](#)

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## AGENT SETUP

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The following items are reviewed in this section:

- 3.1 Agents List
  - 3.1.1 Active agents
  - 3.1.2 Inactive agents
  - 3.1.3 Locked agents
- 3.2 Add (Set up an Agent)
- 3.3 Mapping
  - 3.3.1 By Agent (Agent vs. Skill Mapping)
  - 3.3.2 By Skill (Skill vs. Agent Mapping)
- 3.4 Export
- 3.5 Import
- 3.6 Agent Specific Routing
- 3.7 Resource Grouping
- 3.8 Agent Classification and routing of the calls
- 3.9 DRG and Classification Call Routing Options

### Related Topics

- [Agents List](#)
- [Add \(Set up an Agent\)](#)
- [Mapping](#)
- [Export](#)
- [Import](#)
- [Agent Specific Routing](#)
- [Resource Grouping](#)
- [Agent Classification](#)
- [DRG and Classification Call Routing Options](#)

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## CAMPAIGNS

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This section describes how to upload and build campaigns. A campaign is defined as a file which is loaded with a list of accounts to call. The following items are reviewed in this section:

- 5.1 Uploading a campaign
  - 5.1.1 Call List Shelf Life
- 5.2 Duplicate File Check
- 5.3 Assigning Campaign Dial Characteristics
- 5.4 Building a Campaign
- 5.5 Template manager and partitioning
  - 5.5.1 Creating a new template in Template Manager
- 5.6 Template Manager and Partitioning
  - 5.6.1 Creating a New Template in Template Manager
  - 5.6.2 Adding a New Partition to a Template
  - 5.6.3 Configuring Templates - Partition Mode
  - 5.6.4 Configuring Templates - Configure Mode
  - 5.6.5 Configuring Templates - Apply Mode
  - 5.6.6 Applying Templates in Campaign Manager
  - 5.6.7 Recurrence for Partitioned Campaigns

### Related Topics

[Uploading a Campaign](#)  
[Duplicate File Check](#)  
[Assigning Campaign Dial Characteristics](#)  
[Building a Campaign](#)  
[Requeuing a Campaign](#)  
[Template Manager and Partitioning](#)

---

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**CALL LIST SHELF LIFE**

Shelf life defines the number of days the campaigns will be displayed in the Completed archive folder from the Campaign Manager window. Users may contact their account team or [client-services@livevox.com](mailto:client-services@livevox.com) to confirm or modify the timeframe setting for the files to be removed directly from the display in Campaign Manager to allow for easier viewing of only the most current files. A maximum system limitation of 30 days exists for the campaign shelf life. Data for reports exists on the LiveVox system beyond this limit. See the Reporting section for these date limitations.

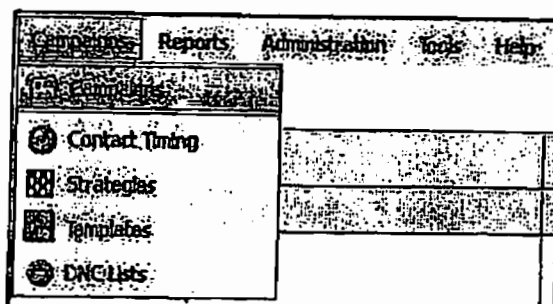
**Related Topics**

[Uploading a Campaign](#)

---

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- **Navigate to the Campaign manager by selecting the 'Campaigns' link from the Campaigns drop down menu of the main Voice Portal menu.**




- [illegible]

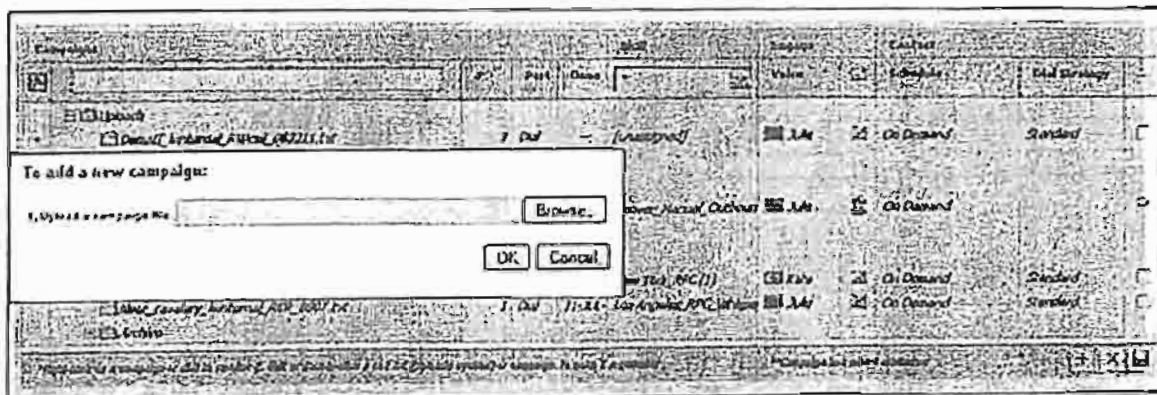
**Archive - subcategory – Completed and reported files older than the current date are archived; these files will only be displayed until their shelf life expires.**



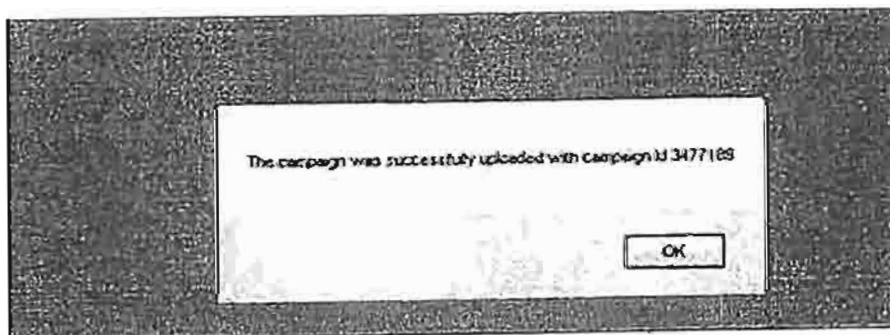
Archive folders are refreshed at midnight ET each night

To upload a file, follow the below steps:

- Click the add button  in the lower-right corner of the campaign manager window. This will bring up a new window (next screen) asking for the file you want to upload:



- Click on the 'Browse' button to navigate to the directory that contains your upload file(s).
- Select the file you wish to upload (one at a time) by highlighting the file, and clicking 'Open', or by double-clicking on the filename.
- Choose 'OK' when done. A window will appear confirming the file has been uploaded successfully.

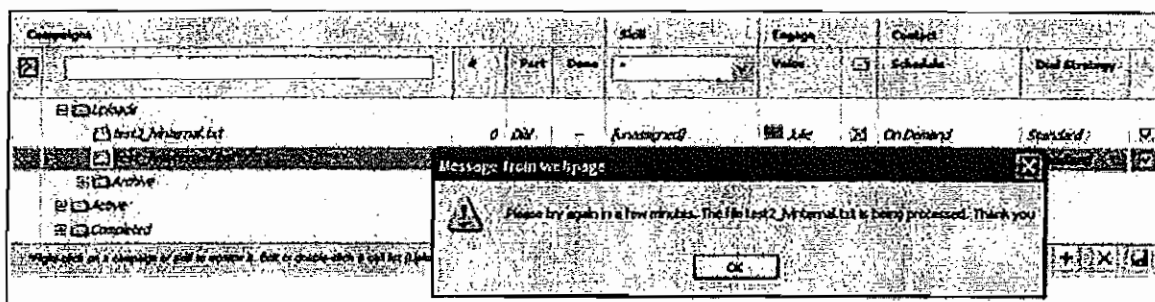


Campaigns should be submitted individually, not in batches. Please wait for confirmation before proceeding to assigning attributes to the next campaign. If you wish to load multiple files they can be sent via SFTP and processed automatically.

When uploading a new file, the campaign manager will check to see if the previous file has been fully processed. User will get an alert ("Please try again in a few minutes. The file FILENAME is being processed. Thank you") if the file has not been fully processed and a save has been attempted

## 5.1 Uploading a Campaign - LiveVox Voice Portal

Page 3 of 3



## Related Topics

[Campaigns](#)[Call List Shelf Life](#)

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PA34

## DUPLICATE FILE CHECK

Files loaded are checked against files already loaded to check if the name or content of any campaign files are duplicated.

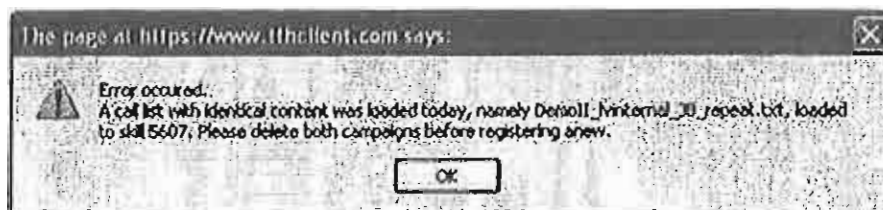
As a safeguard, LiveVox protects users against registering a campaign with the same name, to the same skill, or with exactly the same content/account information, as a campaign that has dialed or may be dialed within the same day.

Examples of error messages include the following:

- Duplicate by skill:



- Duplicate by content:



### Related Topics

[Campaigns](#)

---

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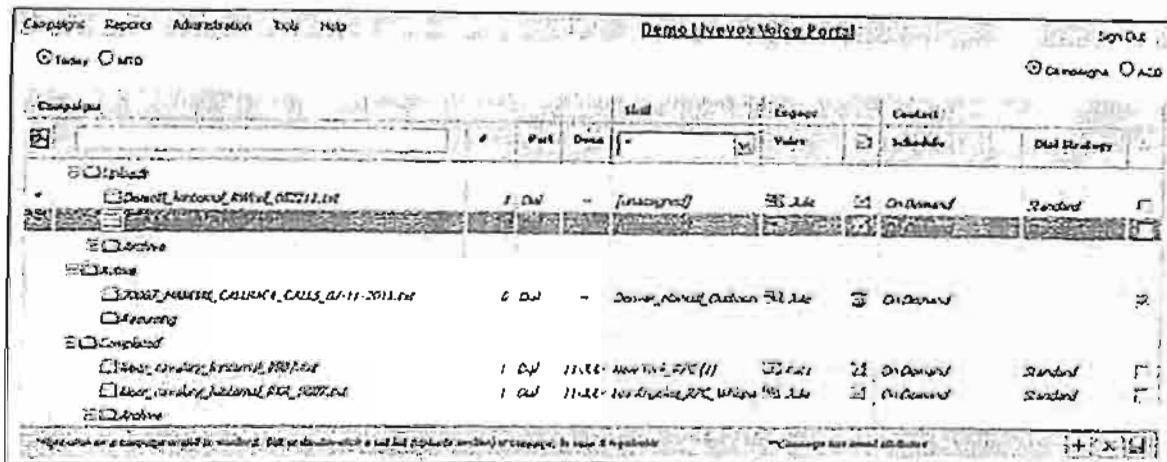
## 5.3 Assigning Campaign Dial Characteristics - LiveVox Voice Portal

Page 1 of 6

## ASSIGNING CAMPAIGN DIAL CHARACTERISTICS

After a campaign has been uploaded but before it can be played, the dialing characteristics must be assigned. Instructions for setting which characteristics a campaign should use are explained in the below steps:

- Once files are uploaded, they will appear under the Uploads folder as seen on the screen shot below (unless a required template is applied to the uploaded file in which case it would move automatically to the Active folder).



- Under the 'Skill' column, click on 'unassigned'.

This will open another window, seen below. Hovering over '[unassigned]' will display all call centers and skills under them. Pick the Call Center and skill into which you want to load a file / campaign.



## 5.3 Assigning Campaign Dial Characteristics - LiveVox Voice Portal

Page 3 of 6

- Callback phone can be typed in at this time. The callback phone is the number left on answering machine or live person messages by the LiveVox system.



Users can contact Livevox Support to add or modify the pre-defined caller ID phone numbers displayed by skill.

- To define the desired voice talent and messaging click on the available voice talent in the "Voice" column. The below features "Julie" as an example.

| Campaign                        | #  | Part | Phone      | Value   | Schedule  | Old Strategy |
|---------------------------------|----|------|------------|---------|-----------|--------------|
| 2300002 Internal Email 06/22/11 | 1  | Def  | Unassigned | 001 216 | On Demand | Standard     |
| 2300002 Internal Email 06/22/11 | 2  | Def  | Unassigned | 001 216 | On Demand | Standard     |
| 2300002 Internal Email 06/22/11 | 3  | Def  | Unassigned | 001 216 | On Demand | Standard     |
| 2300002 Internal Email 06/22/11 | 4  | Def  | Unassigned | 001 216 | On Demand | Standard     |
| 2300002 Internal Email 06/22/11 | 5  | Def  | Unassigned | 001 216 | On Demand | Standard     |
| 2300002 Internal Email 06/22/11 | 6  | Def  | Unassigned | 001 216 | On Demand | Standard     |
| 2300002 Internal Email 06/22/11 | 7  | Def  | Unassigned | 001 216 | On Demand | Standard     |
| 2300002 Internal Email 06/22/11 | 8  | Def  | Unassigned | 001 216 | On Demand | Standard     |
| 2300002 Internal Email 06/22/11 | 9  | Def  | Unassigned | 001 216 | On Demand | Standard     |
| 2300002 Internal Email 06/22/11 | 10 | Def  | Unassigned | 001 216 | On Demand | Standard     |

- Select the voice talent desired. The flag next to each voice talent indicates the language/ accent. The following is a list of possible voice talents:
  - Julie - American Female
  - Kate - British Female
  - Bob - American Male
  - Scarlet - American southern Female
  - Juanita - Spanish Female
  - Gisele - Portuguese Female
  - Gruff M - American Male
  - Gruff F - American Female
  - Lee - American Male
  - Claudine - French Canadian Female



Please note that NOT ALL voice talents are available for all clients. Please check with your LiveVox account team on what may be available to your company.

- Select your messaging options by clicking in the "Messaging" column.
  - 'Leave a message on detected answering machines' - Detects answering machines and leaves a message
  - 'Hang up on a detected answering machine' - if an answering machine is detected no message is left and the call is disconnected.

PA38

- o 'Transfer' all connections' – Answering machine detection is off. Passes all connections to agents.



The Messaging and Answering Machine options will reset to the new skill's default option whenever a new skill is selected.

| Campaigns   | Part | Desc  | Engage | Contact   | Dial Strategy |
|---|------|---|--------|-----------|---------------|
| <input type="checkbox"/> Inactive                                   |      |   |        |           |               |
| <input type="checkbox"/> Pending Internal Skill Assignment          | 1    | Out - (unassigned)                          | 100%   | On Demand | Standard      |
| <input type="checkbox"/> Archive                                    |      |   |        |           |               |
| <input type="checkbox"/> Active                                     |      |   |        |           |               |
| <input type="checkbox"/> 2007 MONTHLY CALLBACK CALLS AP-11-2011.txt |      |   |        | On Demand |               |
| <input type="checkbox"/> Recording                                  |      |   |        |           |               |
| <input type="checkbox"/> Completed                                  |      |   |        |           |               |
| <input type="checkbox"/> New_campaigns Internal 1907.txt            | 2    | Out 11-11-11 New York APC (1)               | 100%   | On Demand | Standard      |
| <input type="checkbox"/> New_campaigns Internal 1907-1907.txt       | 1    | Out 11-11-11 Los Angeles APC where 1907.txt | 100%   | On Demand | Standard      |
| <input type="checkbox"/> Archive                                    |      |   |        |           |               |

- Once you have selected your 'Messaging' options, select your desired 'Schedule' settings. By default, all new campaigns are built 'On Demand' which means that the user determines when to begin dialing the campaigns. If you would like to schedule this campaign for some time in the future, click on 'On Demand' and then select 'Schedule a Run'. By default all campaigns end by 9 PM local time. The below screen will let you choose when this campaign will begin and end:

**Edit Schedule**

text.txt

Applies to all campaigns derived from the call list

**Dialing Days**

☐ Monday  
☒ Tuesday  
☐ Wednesday  
☐ Thursday  
☐ Friday  
☐ Saturday  
☐ Sunday

☐ Recur

**Dialing Interval**

Start:  
☐ ASAP  
☒ 09 : 00  
 End:  
☒ 11 : 00  
☐ End of Day

Times are EST

Cancel OK

## 5.3 Assigning Campaign Dial Characteristics - LiveVox Voice Portal

Page 5 of 6

**Start** = Time that this campaign will build and start dialing

**End** = Time that this campaign will end

**Days** = Days that you want this campaign to run. These are all relative to the current moment in time, meaning that if today is Wednesday, and you want this campaign to run today, select Wednesday. If you want to schedule this campaign to run next Tuesday, select Tuesday. The system will know that you are requesting the next Tuesday available.

**Recur** = Select "Recur" if you want this campaign to repeat every week on the day(s) and time(s) specified. Recurring file settings that have previously been assigned can be edited from the Recurring subfolder within the Active folder in the Campaigns page.

Choose the "Recur" button and, after saving the campaign settings, uploading a file with the SAME NAME via FTP on subsequent days (with a check in the Dialing Days column) will automatically have the campaign settings/schedule applied. Note that a file loaded via the Voice Portal, or with a different name will not have the recurring campaign settings automatically assigned. Recurring campaigns must be uploaded prior to the scheduled start time.

**ASAP** = provides user the ability to start campaigns as soon as possible. It is an alternative to scheduling a specific start time.

**End of Day** = alternative to scheduling a specific end time. Selecting this option will result in no scheduled stop. The campaign will end by curfew, depletion or when a user presses stop in the campaign.



*Scheduled campaign time frames use military/24 hour time and are based on the Eastern Time Zone.*

- When done scheduling the campaign, press 'OK'. This will take you back to the campaigns screen.

| Campaign                   | Start | End | Days       | Time  | Strategy   | File  | File Strategy |
|----------------------------|-------|-----|------------|-------|------------|-------|---------------|
| 1. 01/01/2013 - 01/01/2013 | 0. 00 | -   | 01/01/2013 | 00:00 | 01/01/2013 | 00:00 | 01/01/2013    |
| 2. 01/01/2013 - 01/01/2013 | 1. 00 | -   | 01/01/2013 | 01:00 | 01/01/2013 | 01:00 | 01/01/2013    |
| 3. 01/01/2013 - 01/01/2013 | 2. 00 | -   | 01/01/2013 | 02:00 | 01/01/2013 | 02:00 | 01/01/2013    |
| 4. 01/01/2013 - 01/01/2013 | 3. 00 | -   | 01/01/2013 | 03:00 | 01/01/2013 | 03:00 | 01/01/2013    |

- Select the appropriate dialing strategy by selecting the appropriately named strategy from the "Dialing Strategy" column. Reference section 6 of this document for detailed overview.
- LiveVox can identify cell phones listed in a national cell phone database. Depending on whether or not the "Dial Cell Phones" box (the last option) has been selected LiveVox will or will not dial cell phones. The default for each client can be set so that it doesn't have to be changed every time (please contact LiveVox Support for more information).

PA40

- o By checking the Dial Cells box, identified cell phone numbers will be included in a dialing campaign.
- o Un-checking the Dial cells box will suppress all detected cell phone numbers from a dialing campaign.



To assist clients with wireless number dialing strategies, LiveVox uses a database of wireless numbers from Interactive Marketing Solutions (<http://www.ims-dm.com/>). LiveVox is subscribed for the automated file delivery service from IMS for the following:

- Wireless block identifier file (The list of area codes and exchanges or blocks of numbers assigned to wireless carriers active within the North American Numbering Plan in the US and Canada).
  - Received from IMS monthly.
- Ported number file (The list of numbers that appear to belong to wired land lines but are now assigned to wireless telephones and the list of numbers that appear to belong to wireless telephones but are now assigned to wired land lines.)
  - Received from IMS daily.

For more information please refer to the FAQ's from Interactive Marketing Solutions:

[http://www.ims-dm.com/products/WBI\\_FAQs.pdf](http://www.ims-dm.com/products/WBI_FAQs.pdf)

<http://www.ims-dm.com/products/PortedFAQs.pdf>

Please note that while IMS services are very accurate, LiveVox cannot guarantee 100% accuracy at all times, given the update intervals and other factors.

- Save changes when completed by selecting the save option in the right bottom corner of the Campaign Manager window.



If a file was mistakenly loaded, select the "Delete" field box and then save. The inappropriate file can be checked to delete permanently before submitting Campaign Builder requests.

#### Related Topics

[Campaigns](#)

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## BUILDING A CAMPAIGN

Building a campaign will take the file that was uploaded to the LiveVox server and load it into a table so that it is ready to be dialed. After the build process has completed, the campaign is ready for dialing.

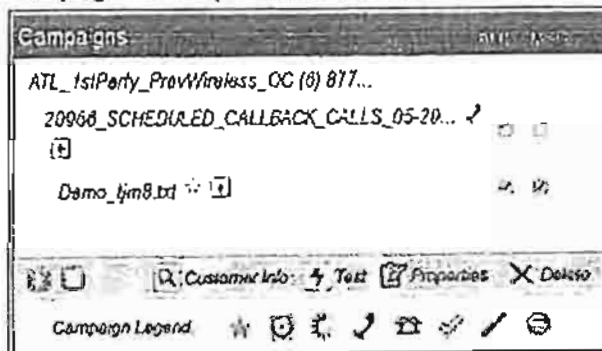
To build a campaign that was set to run "On Demand", follow the below steps:

- Right-click on the campaign name of a file that has had all dial characteristics assigned and saved to open the Skill Page.

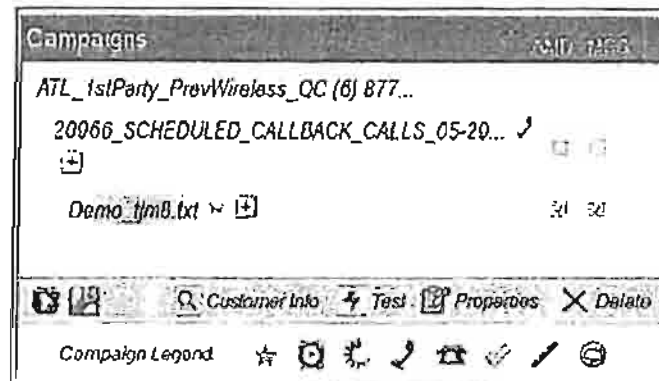
| Campaigns      | Part   | Done | Skill                     | Engage | Contact             |               |
|----------------|--------|------|---------------------------|--------|---------------------|---------------|
|                |        |      |                           | Voice  | Schedule            | Dial Strategy |
| Uploads        |        |      |                           |        |                     |               |
| Active         |        |      |                           |        |                     |               |
| 29081_MANUAL_C | 0 Dial | --   | ATL_1stParty_Recovery_1   | Julie  | On Demand           | ✓             |
| Demo_tjm8.txt  | 4 Dial | --   | ATL_1stParty_ProvWireless | Julie  | On Demand: Standard | ✓             |
| Recurring      |        |      |                           |        |                     |               |
| Completed      |        |      |                           |        |                     |               |

*Right-click on a campaign or skill to monitor it. Edit or double-click a call list (Uploads section) or campaign, to make it registrable*

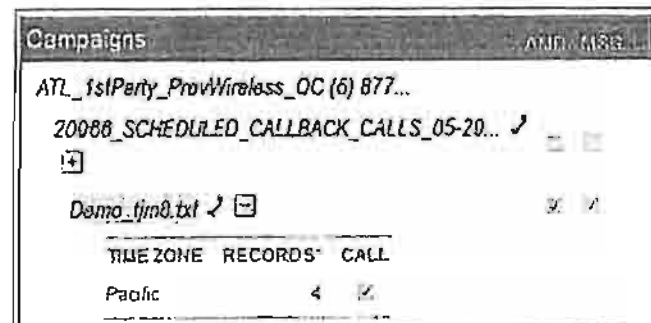
- On the skill page the campaign name will appear with a gray star (screen shot below), indicating the campaign has not yet been built and is not ready to dial.



- Upon clicking on the campaign name the option to "Play" or "Prebuild" will become available. In either situation a spinning gray "Building" icon will appear while the build process is underway.
  - "Play" will build the campaign and, if agents are available and there are accounts allowed to dial based on your Dialing Profile, dialing will begin.
  - "Prebuild" will allow you to see how many accounts are available but will not start dialing until you select Play.



- The campaign build process is completed when the spinning icon disappears. View accounts broken out by time zone by selecting the plus symbol next to the campaign name.



#### Related Topics

[Campaigns](#)

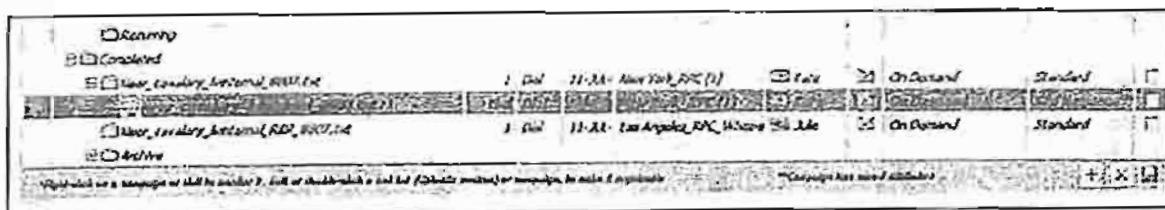
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## REQUEUEING A CAMPAIGN

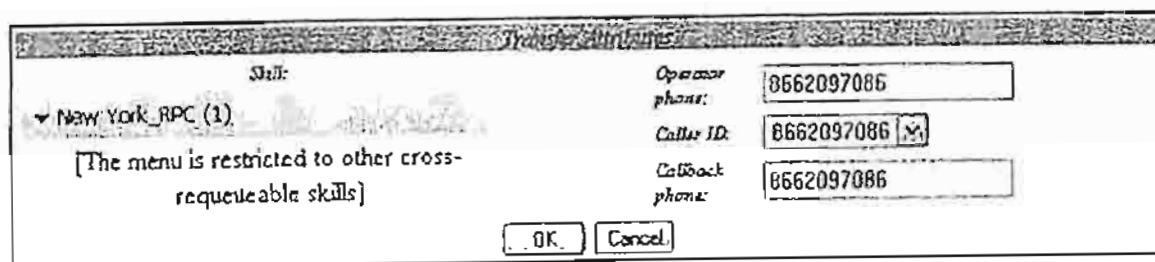
After a campaign has finished dialing or has been stopped manually, you may requeue the campaign to run certain results again, essentially providing the capability to make multiple passes on a single file without having to reload it.

Campaigns available for re-queuing will be listed under the 'Completed' folder with a date in the 'Date Run' column as shown below or prior to the campaign running while in the Uploads folder.

- To requeue your file, highlight the file name and press the 'add' button in the lower right corner of the Campaign Manager window.
- When you do this, the requeue file will appear immediately under the original file.



- You can requeue a campaign file on the same skill or across skills (Cross Skill requeue).
  - By default the skill assigned is the same as the skill the original campaign was assigned to.
  - Depending on skill settings, users may have the ability to requeue campaign on a different skill by selecting the skill that you wish to requeue to under the skill attribute column (screen shot below). This allows you to run on an RPC skill first, for example, and then requeue certain results to be run on a Quick Connect skill for the second pass.



- You can only requeue within a set of skills in call center.
- You cannot requeue on a skill that has custom (different input) logic.
- Wireless numbers can be allowed or suppressed regardless of which wireless setting was assigned in the parent campaign.
- At this point, you can also add or change the Messaging, Scheduling, or Dialing strategy options.
- When scheduling requeue campaigns you can choose to run the campaign at a schedule you determine on either the same day as the original run or on the next day. Selecting "Schedule a Run" in the schedule tab displays the following overlay with user options for running a



requeue campaign.

**Edit Schedule**

test list r1

**Dialing Day**

☒ Same Day  
☐ Next Day

**Dialing Interval**

Start:  
☐ ASAP  
☒ 09 : 00

End:  
☒ 11 : 00  
☐ End of Day

*Relative to the dialing day of the parent campaign*

*Times are EST*

Cancel OK

- Select the 'OK' button in the right bottom corner of the screen to save your changes.

#### Related Topics

[Campaigns](#)

[Campaign Requeue Tips](#)

---

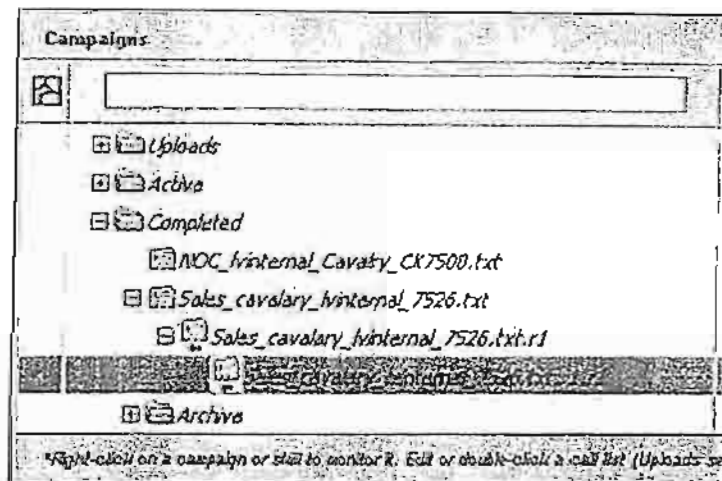
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### CAMPAIGN REQUEUE TIPS

Be sure to setup your campaign requeues by only building requeue files from the previous campaign. Failing to do so may result in redialing an account that was previously an RPC or live party by taking into account that prior run's outcomes.

- Subsequently requeued files are appended by a file extension of ".r1" representing each prior requeue. For example:
- Requeue of original file = .r1
- Requeue of first requeue (.r1) = .r1.r1
- Requeue of second requeue (.r1.r1) = .r1.r1.r1

The figure below shows a file which was setup correctly in that the requeue file always builds the list by the previous file's outcomes:

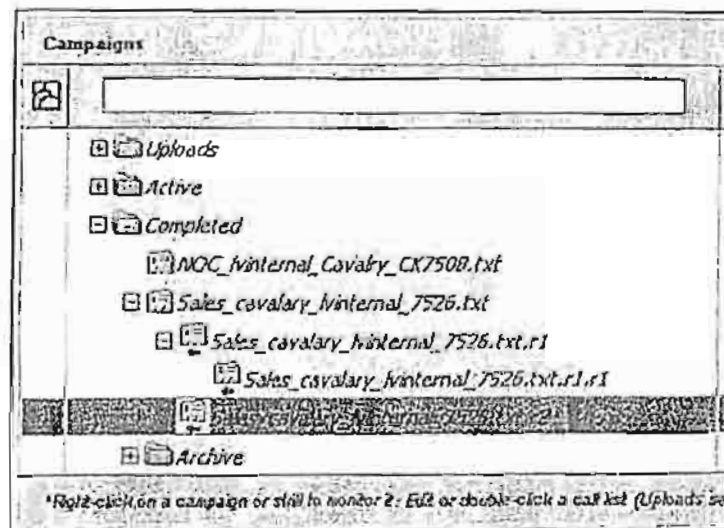


Not building a subsequent requeue off of the previous file's outcomes will append a sequential file extension such as .r2, .r3, etc.

In this example below the original file was requeued in both a subsequent *and* a sequential manner:

- Requeue of original file = .r1
- Requeue of previous file = .r1.r1
- 2nd Requeue of original file = .r2

In this scenario a previously contacted account or phone number from the .r1 and .r1.r1 files may be dialed in the .r2 file, as the .r2 only considers outcomes from the original run.



#### Related Topics

[Requeuing a Campaign](#)

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## TEMPLATE MANAGER AND PARTITIONING

The following sections describe the usage of Template Manager and how to split files.

### Related Topics

[Campaigns](#)

[Creating a New Template in Template Manager](#)

[Adding a New Partition to a Template](#)

[Configuring Templates - Partition Mode](#)

[Configuring Templates - Configure Mode](#)

[Configuring Templates - Apply Mode](#)

[Applying Templates in Campaign Manager](#)

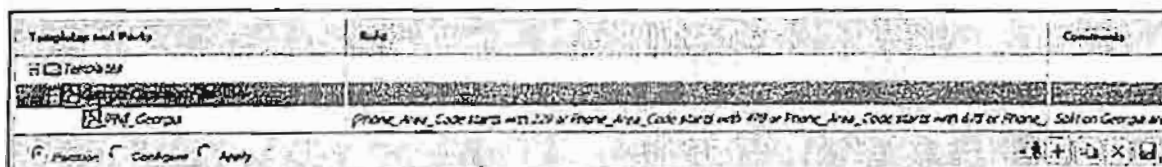
[Recurrence for Partitioned Campaigns](#)

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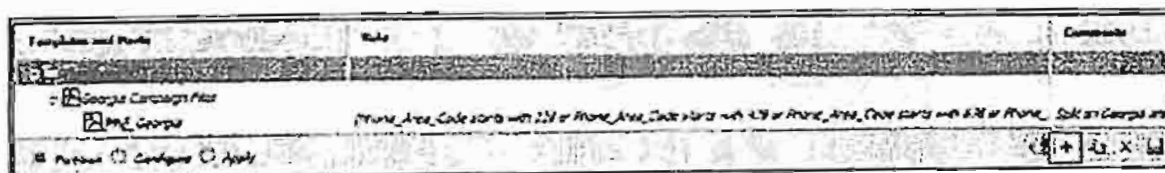
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## CREATING A NEW TEMPLATE IN TEMPLATE MANAGER

The Template Manager allows users to define and maintain templates.



- **Templates** – Templates form the baseline allowing users to create partitions, parts, and rules
  - A Template must be created in order to create a partition, which can then have parts and rules associated with that partition.
- Adding a new Template.
  - Select the '+' symbol (highlighted in Red)



- When the '+' is pressed, a new template will be added. Select the rename button (highlighted in Red) to rename the new Template as something which reflects the function of the new template (Example illustrates a template which splits a file based on Georgia Area Codes)



### Related Topics

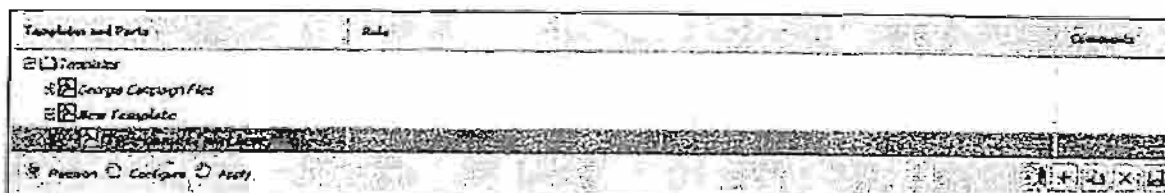
[Template Manager and Partitioning](#)

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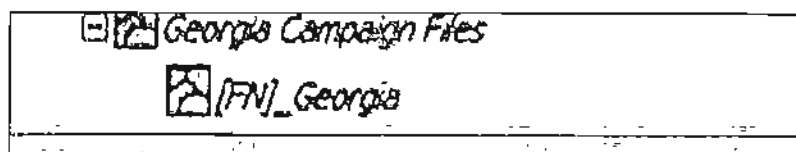
### ADDING A NEW PARTITION TO A TEMPLATE

Once the template has been created, in order to begin setting up rules to split a file, a partition must be created.

- A *partition* is a set of grouping rules, attached to a template.
  - A *part* is a subset of a partition. Multiple *parts* can make up a partition.
  - If the *part* determines a sub campaign, the name of the sub campaign can have a naming convention, with supported variables, as defined below.
    - The following variables are supported:
      - [FN] = filename without extension
      - [EXT] = filename extension (ex: .txt)
      - [YYYY] – 4 digit year
      - [YY] – 2 digit year
      - [MM] – 2 digit month
      - [DD] – 2 digit day
- How to add a new Partition to a Template.
  - Highlight the new template that was created and press the '+' button in order to create a partition.



- Rename the new partition using supported variables (discussed above). The below screen shot illustrates a partition which is named using [FN] variable (filename without extension).



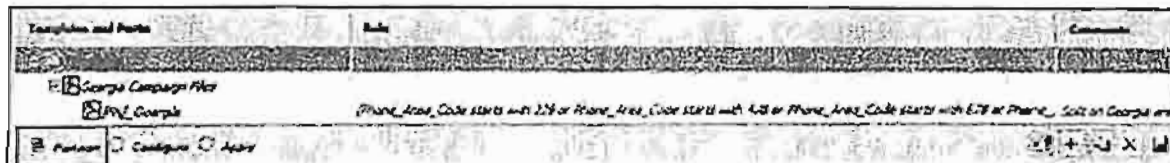
If you uploaded and partitioned file named Campaign\_1.txt, the resulting sub campaign filename would be Campaign\_1\_Georgia.txt

#### Related Topics

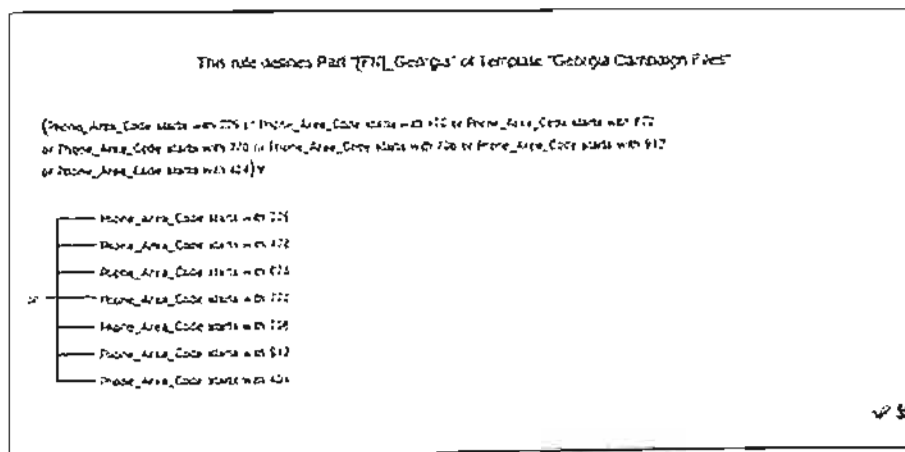
[Template Manager and Partitioning](#)

**CONFIGURING TEMPLATES - PARTITION MODE**

Created partitions can be managed using Partition Mode. Partition Mode allows users to add rules to the previously defined partitions:



When this mode is selected users can configure the rules used to split a campaign file. These rules are known as Grouping Rules. The example below illustrates a template with rules set to split a file based on area code:

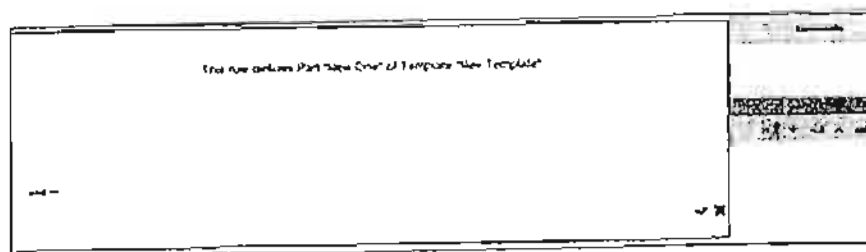


- Each individual line displayed above is also known as a simple grouping rule.
- A condition used for the rule is based on a value provided in the input file
- All simple rules combined make a complex grouping rule.

**How to add a grouping rule to a partitioning template part**

Adding a simple grouping rule:

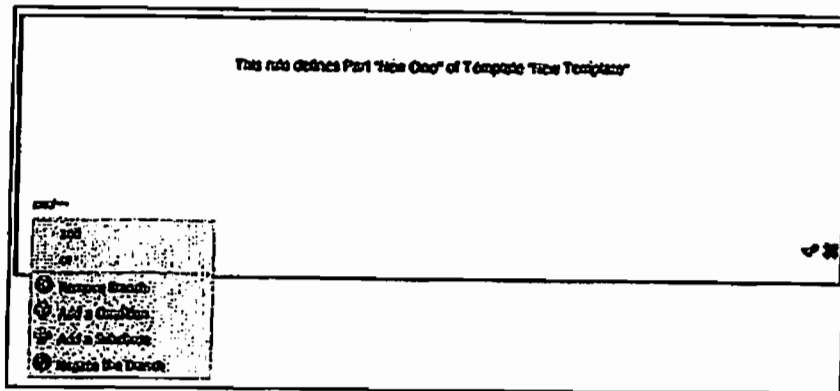
- Click on the area below the 'Rule' section to bring up the condition editor



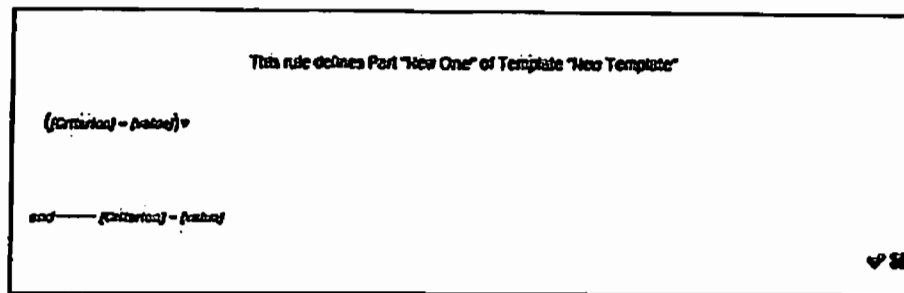
- Click over the 'And' Condition in order to bring up the various options for part rules.

## 5.6.3 Configuring Templates - Partition Mode - LiveVox Voice Portal

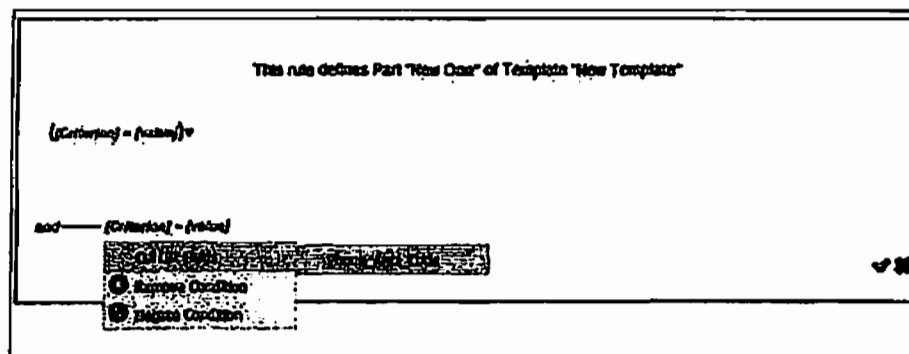
Page 2 of 3



- Click on "Add a Condition" in order to add a single grouping rule to the part.



- Criterion and Value selections are predefined during setup process. Please let the LiveVox team know what criteria you plan using for splitting files. If additional values need to be added at a later date, please contact LiveVox Support.
  - This example uses Phone\_Area\_Code as predefined Criterion.



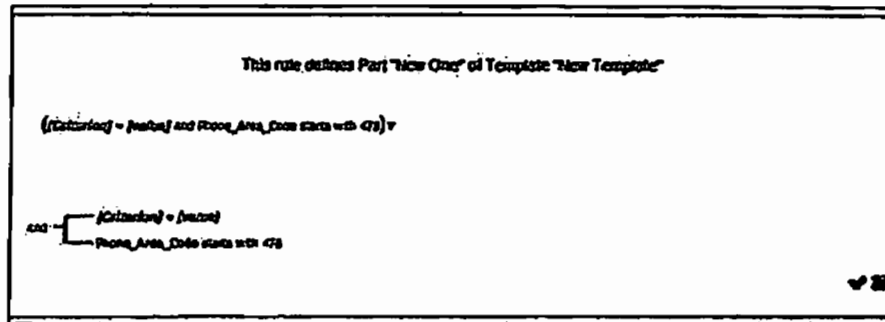
- Final step is to select the value, for example, area code 229.
- A complex grouping rule can be applied by adding more conditions to the rule 2, different operators are used to link grouping rules:
  - AND requires that all conditions linked with AND are fulfilled.
  - OR requires that at least 1 condition linked with OR is fulfilled.

PA52



## 5.6.3 Configuring Templates - Partition Mode - LiveVox Voice Portal

Page 3 of 3

**Related Topics**[Template Manager and Partitioning](#)

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PA53

**CONFIGURING TEMPLATES - CONFIGURE MODE**

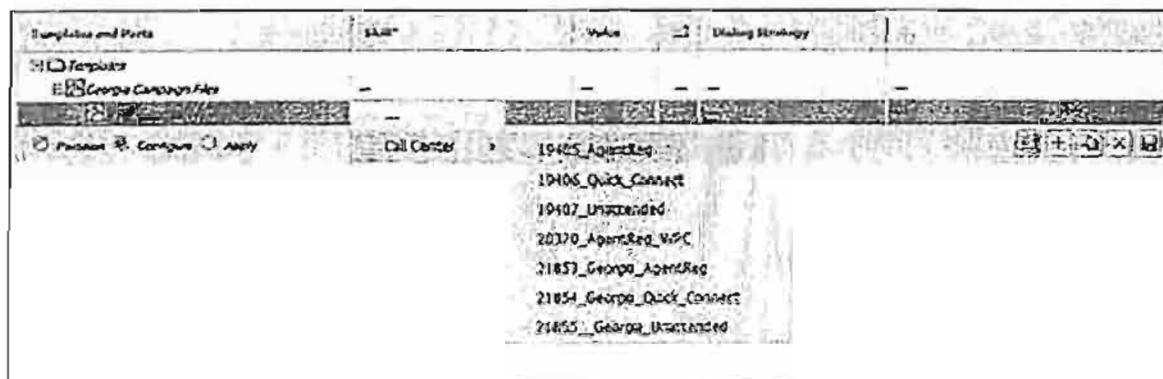
Once rules have been defined, Configure Mode is used to assign specific campaign attributes to the sub campaigns generated by their partitions.

- This mode is similar to the Campaign Manager – skills, voice talent, messaging options, dialing strategy, and dial cell phone options are all available here and *are configured in the same manner as in Campaign Manager*
- This mode allows users to assign attributes to an entire campaign as well as to the partitioned sub campaigns

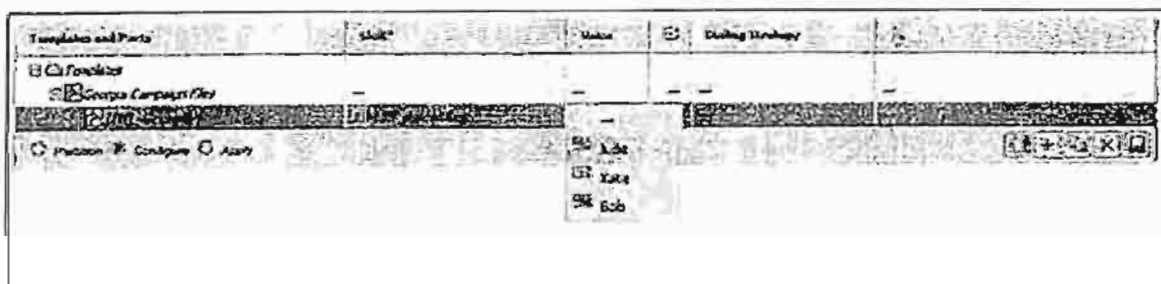


Users may select the following attributes for the specific Configuration Template:

- Skill



- Voice talent



- Message option

## 5.6.4 Configuring Templates - Configure Mode - LiveVox Voice Portal

Page 2 of 2

The screenshot shows the 'Configure Mode' interface for a template. The 'Dialing Strategy' tab is selected. The 'Dialing Strategy' dropdown menu is open, showing options: 'Leave a message on detected answering machines', 'Hang up on detected answering machines', and 'Transfer all connections'. The 'Dialing Strategy' dropdown is currently set to 'Leave a message on detected answering machines'.

- Dialing strategy

The screenshot shows the 'Configure Mode' interface for a template. The 'Dial Cells' tab is selected. The 'Dial Cells' dropdown menu is open, showing options: 'PCE Only', 'PCE Required', 'SP Test', 'Standard', and 'Std. Response'. The 'Dial Cells' dropdown is currently set to 'PCE Only'.

- Dial cells

The screenshot shows the 'Configure Mode' interface for a template. The 'Dial Cells' tab is selected. The 'Dial Cells' dropdown menu is open, showing options: 'Dial Cells' and 'Don't dial cells'. The 'Dial Cells' dropdown is currently set to 'Dial Cells'.



\*-dash in the drop down value means no configuration has been defined.

## Related Topics

[Template Manager and Partitioning](#)

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**CONFIGURING TEMPLATES - APPLY MODE**

Finally, Apply mode, is used to set specific dispositions, or behaviors, for partitions in a template. This allows a single campaign and its sub campaigns to vary depending on how a user has defined their templates.

In Template Manager, users may indicate the settings of parts within a dialing campaign. The optional modes are:

- **Dial:** default mode for original and requeue campaign.
- **Exclude:** This will exclude any record contained in that part or the main campaign.
- **Split:** Only available to parts in the upload section. A separate campaign is created from the campaign records
- **Join:** Only available to partitions in the Campaign Manager. Joins partitioned campaigns into a single campaign

| Template and Parts | Disposition | Require | Filename Format | Protected | Enabled |
|--------------------|-------------|---------|-----------------|-----------|---------|
| Campaign           |             |         |                 |           |         |
| Part 1             |             |         |                 |           |         |
| Part 2             |             |         |                 |           |         |
| Part 3             |             |         |                 |           |         |
| Part 4             |             |         |                 |           |         |
| Part 5             |             |         |                 |           |         |
| Part 6             |             |         |                 |           |         |
| Part 7             |             |         |                 |           |         |
| Part 8             |             |         |                 |           |         |
| Part 9             |             |         |                 |           |         |
| Part 10            |             |         |                 |           |         |
| Part 11            |             |         |                 |           |         |
| Part 12            |             |         |                 |           |         |
| Part 13            |             |         |                 |           |         |
| Part 14            |             |         |                 |           |         |
| Part 15            |             |         |                 |           |         |
| Part 16            |             |         |                 |           |         |
| Part 17            |             |         |                 |           |         |
| Part 18            |             |         |                 |           |         |
| Part 19            |             |         |                 |           |         |
| Part 20            |             |         |                 |           |         |
| Part 21            |             |         |                 |           |         |
| Part 22            |             |         |                 |           |         |
| Part 23            |             |         |                 |           |         |
| Part 24            |             |         |                 |           |         |
| Part 25            |             |         |                 |           |         |
| Part 26            |             |         |                 |           |         |
| Part 27            |             |         |                 |           |         |
| Part 28            |             |         |                 |           |         |
| Part 29            |             |         |                 |           |         |
| Part 30            |             |         |                 |           |         |
| Part 31            |             |         |                 |           |         |
| Part 32            |             |         |                 |           |         |
| Part 33            |             |         |                 |           |         |
| Part 34            |             |         |                 |           |         |
| Part 35            |             |         |                 |           |         |
| Part 36            |             |         |                 |           |         |
| Part 37            |             |         |                 |           |         |
| Part 38            |             |         |                 |           |         |
| Part 39            |             |         |                 |           |         |
| Part 40            |             |         |                 |           |         |
| Part 41            |             |         |                 |           |         |
| Part 42            |             |         |                 |           |         |
| Part 43            |             |         |                 |           |         |
| Part 44            |             |         |                 |           |         |
| Part 45            |             |         |                 |           |         |
| Part 46            |             |         |                 |           |         |
| Part 47            |             |         |                 |           |         |
| Part 48            |             |         |                 |           |         |
| Part 49            |             |         |                 |           |         |
| Part 50            |             |         |                 |           |         |
| Part 51            |             |         |                 |           |         |
| Part 52            |             |         |                 |           |         |
| Part 53            |             |         |                 |           |         |
| Part 54            |             |         |                 |           |         |
| Part 55            |             |         |                 |           |         |
| Part 56            |             |         |                 |           |         |
| Part 57            |             |         |                 |           |         |
| Part 58            |             |         |                 |           |         |
| Part 59            |             |         |                 |           |         |
| Part 60            |             |         |                 |           |         |
| Part 61            |             |         |                 |           |         |
| Part 62            |             |         |                 |           |         |
| Part 63            |             |         |                 |           |         |
| Part 64            |             |         |                 |           |         |
| Part 65            |             |         |                 |           |         |
| Part 66            |             |         |                 |           |         |
| Part 67            |             |         |                 |           |         |
| Part 68            |             |         |                 |           |         |
| Part 69            |             |         |                 |           |         |
| Part 70            |             |         |                 |           |         |
| Part 71            |             |         |                 |           |         |
| Part 72            |             |         |                 |           |         |
| Part 73            |             |         |                 |           |         |
| Part 74            |             |         |                 |           |         |
| Part 75            |             |         |                 |           |         |
| Part 76            |             |         |                 |           |         |
| Part 77            |             |         |                 |           |         |
| Part 78            |             |         |                 |           |         |
| Part 79            |             |         |                 |           |         |
| Part 80            |             |         |                 |           |         |
| Part 81            |             |         |                 |           |         |
| Part 82            |             |         |                 |           |         |
| Part 83            |             |         |                 |           |         |
| Part 84            |             |         |                 |           |         |
| Part 85            |             |         |                 |           |         |
| Part 86            |             |         |                 |           |         |
| Part 87            |             |         |                 |           |         |
| Part 88            |             |         |                 |           |         |
| Part 89            |             |         |                 |           |         |
| Part 90            |             |         |                 |           |         |
| Part 91            |             |         |                 |           |         |
| Part 92            |             |         |                 |           |         |
| Part 93            |             |         |                 |           |         |
| Part 94            |             |         |                 |           |         |
| Part 95            |             |         |                 |           |         |
| Part 96            |             |         |                 |           |         |
| Part 97            |             |         |                 |           |         |
| Part 98            |             |         |                 |           |         |
| Part 99            |             |         |                 |           |         |
| Part 100           |             |         |                 |           |         |

Users may select "Require" if the user desires the template to be automatically applied. Automatically applied template is also referred to as a required template. By selecting the check box, the template will be automatically applied upon upload to any Campaign file that matches the filename format defined under the Filename Format column. The filename formatting follows standard command prompt guidelines, with a star symbol (\*) acting as a wildcard. The Campaign File is automatically registered and appears directly in the "Active" section of Campaigns

All campaign options (Skill, Voice Talent, Messaging Option, Schedule, Dialing Strategy, Cell phones) are now available and can be configured from the Active Section.

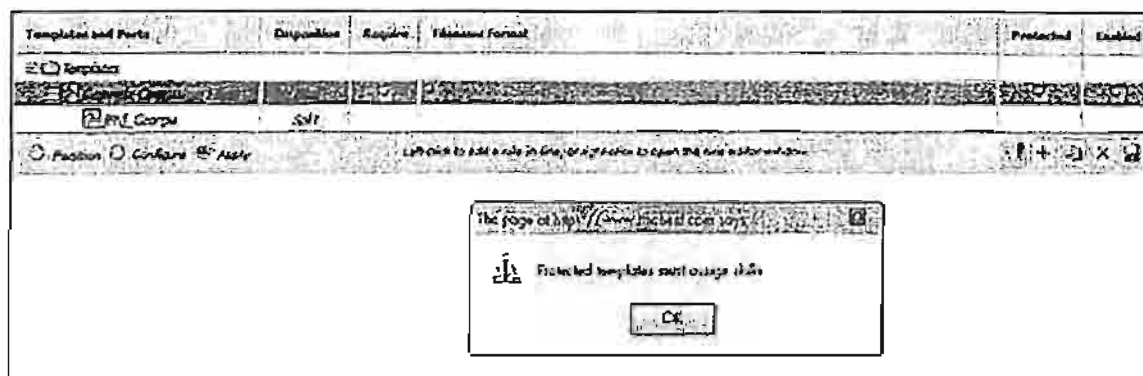


*Only a Superuser can create and maintain a required template. Any user with prepare power (e.g. a Manager) may create and maintain an optional template.*

User may select the "Protected" checkbox to lock non-manager level and users and above from modifying attributes for a template in the template manager. Skill attributes are pre-configured as described in section 5.6.4. "Protected" can only be selected if the template has skills assigned for each Part associated. Users will get the following warning if any skill is not assigned.

## 5.6.5 Configuring Templates - Apply Mode - LiveVox Voice Portal

Page 2 of 2



## Related Topics

[Template Manager and Partitioning](#)

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### 5.6.6 Applying Templates in Campaign Manager - LiveVox Voice Portal

Page 1 of 2

## APPLYING TEMPLATES IN CAMPAIGN MANAGER

Although templates can be automatically applied to campaigns through the rules defined in Template Manager ~ Apply Mode, templates can also be applied in Campaign Manager if the template is not "Required."

## Tutorial: Applying Templates in Campaign Manager

- When uploading a new file user may select a template to apply by clicking on the left most column arrow.

| Campaigns        |                        |   |      | State |
|------------------|------------------------|---|------|-------|
|                  |                        |   | Part | Done  |
|                  | Uploads                |   |      |       |
|                  | Georgia Campaign Files |   |      |       |
| Apply a template |                        | <input type="checkbox"/> Georgia Campaign Files |      |       |
| Active           |                        | <input type="button" value="OK"/>               |      |       |
| 22955_CALLBAG    |                        | 0   | Deal | 22955 |

- Upon selecting the template by clicking on the empty box and pressing OK, user will be able to run the partitioned campaign files.

[illegible]

*When a file has been partitioned, the sub campaigns can have requesues be set by selecting the '+' button.*

As described in section 5.6.5 – *Configuring Templates – Apply Mode*, campaigns can be pre-configured to be split, joined, dialled, or excluded.

- It is also possible to change the pre-configuration disposition of these sub campaigns after applying a template by clicking in the Part column and selecting either *split*, *join*, *dial*, or *exclude*.
- After registration of a campaign, users can choose to exclude any sub campaign from dialing, in which case it will not appear on any monitoring pages.

## 5.6.6 Applying Templates in Campaign Manager - LiveVox Voice Portal

Page 2 of 2

| Campaigns   |  | Part  | Owner      | Value | Schedule  | Dial Strategy |
|---|--|-------|------------|-------|-----------|---------------|
| <input type="checkbox"/> Direct<br><input type="checkbox"/> By George Campaign Files<br><input type="checkbox"/> New Historical Groups<br><input type="checkbox"/> Archive<br><input type="checkbox"/> Active<br><input type="checkbox"/> Completed |  | Split | Unassigned | MSL   | On Demand | Standard      |

Right click on a campaign or click to monitor it. Left or double-click a cell for details including a campaign, to view it separately. Campaign has several attributes.

## Related Topics

[Template Manager and Partitioning](#)

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**RECURRENCE FOR PARTITIONED CAMPAIGNS**

Users may now select recurrence options for campaigns and partitioned campaigns uploaded into Campaign Manager.

- There are several principles for list-level scheduling:
  - Dial entire campaign file on any given day.
  - Individual sub campaigns may be scheduled to dial at different times.
  - On-demand campaigns and their sub campaigns are all dialed on-demand on the day the original campaign is uploaded and built.
    - Requeues are an exception to this rule – requeues can always be on-demand, scheduled, on any given day after the original file has been uploaded and run.

Illustrated below is the Scheduling Configuration tool, which is accessed in Campaign Manager.

- Dialing Day is configured on the left side. Dialing Interval (or time) is configured on the right side
  - Selecting "Recur" will launch files of the same given campaign name on the scheduled time and date.
    - Recurring campaigns must be uploaded prior to the first scheduled start time across all parts.
- The dialing days are only shown in the scheduling form of the original campaign
- As a convenience, system allows the user to specify the dialing days for the call list when editing a part schedule, but user is warned of the global application of the specification.





*It is not suggested that you modify templates while a recurring campaign is in effect*

***How to create a recurring campaign with a template***

- Create a partitioning template
- Ensure that all parts are configured with the correct skill and other attributes.
- Upload a test file and let it be split.
- Set the mother campaign with a recurring schedule.
- Adjust the part schedules as needed.
- Define the recurring schedule for the master file (**Important:** file name should match exactly the name of the file that is being sent. Filename needs to be the same everyday for recurring campaigns).
- Let the first day instance run.
- Recurring campaigns should be uploaded through \_SFTP.
- Note that a file loaded via the Voice Portal, or with a different name, will not have the recurring campaign settings automatically assigned.



*When setting up schedules please taken into account the time required to split the file. Ensure that there is a 10 minute buffer between upload time and scheduled time. For example, don't set the schedules to 8 am if the file is being sent at 8:10 am.*

### 5.6.7 Recurrence for Partitioned Campaigns - LiveVox Voice Portal

Page 3 of 3

#### **Related Topics**

**Template Manager and Partitioning**

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PA62

## CREATING DIALING STRATEGIES

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This section covers the Strategies Manager and describes how to create a new dialing strategy or make changes to a previously defined dialing strategy. The following items are reviewed in this section:

6.1 Strategies Manager

6.2 Creating a New Dialing Strategy for a Campaign

### Related Topics

[Strategies Manager](#)

[Creating a New Dialing Strategy for a Campaign](#)

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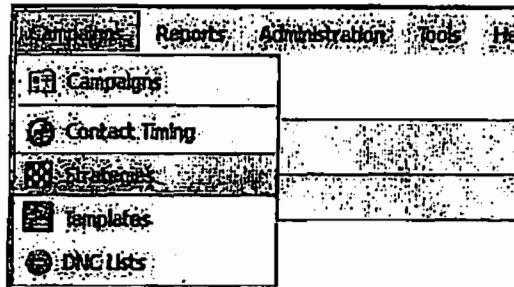
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## 6.1 Strategies Manager - LiveVox Voice Portal

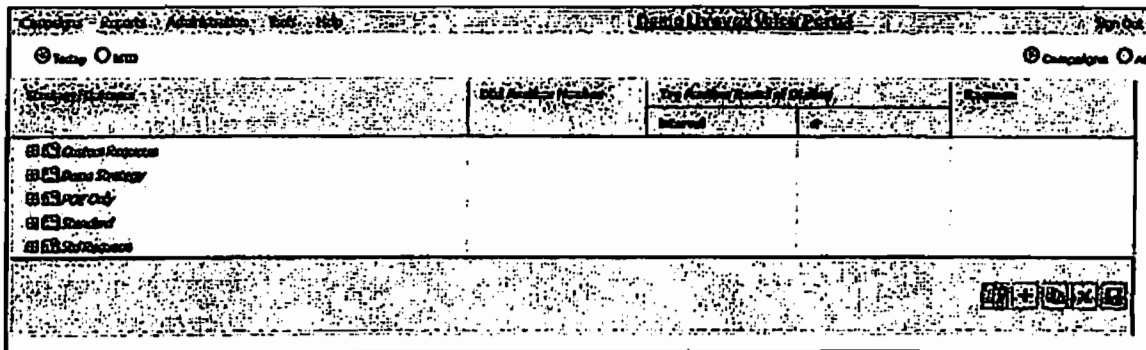
Page 1 of 4

**STRATEGIES MANAGER**

- Navigate to the Strategies Manager by selecting the 'Strategies' link from the Campaigns drop down menu from the main Voice Portal menu.



- User will be taken to the Strategies page. From here users are allowed to configure multiple options for different call strategies and outcomes.



- Available call strategy functions are displayed with their column names below:

| Strategy/Outcome | Call Action Name | Try for this Number of Times | Success |
|------------------|------------------|------------------------------|---------|
|                  |                  | 10000                        | 1       |

The **Strategy/Outcome** column is the unique name for each individual dialing strategy. You can use one of the standard strategies pre-built on your Livevox Voice Portal, or you can create one of your own.

By default, the Dialing Strategy selected for Campaigns is "Standard" and is defined as dialing **sequentially** each phone (Phone 1, Phone 2, Phone 3, and so on) that is contained in the input file provided by the client.

| Strategy/Outcome                               | Dial Another Number                 | Try Another Round of Dialing | Response |
|--|-------------------------------------|------------------------------|----------|
|  |                                     | Interval                     | #        |
| <input type="checkbox"/> Miscellaneous         |                                     |                              |          |
| <input type="checkbox"/> No Connection         |                                     |                              |          |
| <input type="checkbox"/> Not Made              |                                     |                              |          |
| <input type="checkbox"/> Operator Transfer     |                                     |                              |          |
| <input type="checkbox"/> OOS                   |                                     |                              |          |
| <input type="checkbox"/> OOH - All Phone Types |                                     |                              |          |
| <input type="checkbox"/> Customer Hang-Up      |                                     |                              |          |
| <input type="checkbox"/> Busy                  | <input checked="" type="checkbox"/> | 10 minutes                   | 0        |
| <input type="checkbox"/> Ring Up in Progress   |                                     |                              |          |
| <input type="checkbox"/> Left Message          |                                     |                              |          |
| <input type="checkbox"/> Live Worker Hang-Up   |                                     |                              |          |

The 'Dial another Number' option is a setting (check box) that determines if the next number in the dialing sequence associated with an account should be dialed if the current call results in the associated outcome. For example in the below image if the first call (set to phone 1) results in a "Busy" outcome the system will attempt to dial the next phone number (set to phone 2) associated with the account.

| Strategy/Outcome                                | Dial Another Number                 | Try Another Round of Dialing | Response |
|---|-------------------------------------|------------------------------|----------|
|   |                                     | Interval                     | #        |
| <input type="checkbox"/> Custom Response        |                                     |                              |          |
| <input type="checkbox"/> OOH - All Phone Types  |                                     |                              |          |
| <input type="checkbox"/> Customer Hang-Up       |                                     |                              |          |
| <input type="checkbox"/> Left Message           |                                     |                              |          |
| <input type="checkbox"/> Live Worker Hang-Up    |                                     |                              |          |
| <input type="checkbox"/> Miscellaneous          |                                     |                              |          |
| <input type="checkbox"/> No Connection          |                                     |                              |          |
| <input type="checkbox"/> Break Phone Number     | <input checked="" type="checkbox"/> | 10 minutes                   | 0        |
| <input type="checkbox"/> No Answer              | <input checked="" type="checkbox"/> | 10 minutes                   | 0        |
| <input type="checkbox"/> Not Made               |                                     |                              |          |
| <input type="checkbox"/> Operator Transfer      |                                     |                              |          |
| <input type="checkbox"/> OOS                    |                                     |                              |          |
| <input type="checkbox"/> OOH - Cell Phones Only |                                     |                              |          |
| <input type="checkbox"/> OOH - Landlines Only   |                                     |                              |          |
| <input type="checkbox"/> Out of Order           |                                     |                              |          |
| <input type="checkbox"/> Not Only               |                                     |                              |          |
| <input type="checkbox"/> Standard               |                                     |                              |          |
| <input type="checkbox"/> Still Available        |                                     |                              |          |

Call 1: Phone 1    Call 2: Phone 2    Call 3: Phone 3    Call 4: Phone 4    Call 5: Phone 5

The 'Try another Round of Dialing' option consists of two settings:

- 'Interval' determines the time between dialing rounds. This is set in minutes. System will wait this interval before launching another call if # is set to more than 0.
  - o Default setting is 10.
  - o '#' determines the number of re-dialing attempts and is defaulted to 0.
  - o For example, as seen in the image below, if Call 1 results in a Busy signal the system attempts another round of dialing after a 10 minute wait. If a Busy signal is reached again the system attempts the next associated number due to the "Dial another Number" option being checked.

| Strategy/Outcome   | Dial Another Number  | Try Another Round of Dialing | Requeue                  |
|--|--|------------------------------|--------------------------|
| <input type="checkbox"/> Custom Response<br><input type="checkbox"/> 100% - All Phone Types<br><input type="checkbox"/> Customer Hang Up<br><input type="checkbox"/> Left Message<br><input type="checkbox"/> Unable to Connect<br><input type="checkbox"/> Miscellaneous<br><input type="checkbox"/> No Connection<br><input type="checkbox"/> No Answer  |  | Interval: 0                  |                          |
| <input type="checkbox"/> Transfer Phone Number<br><input type="checkbox"/> No Answer<br><input type="checkbox"/> Not Made<br><input type="checkbox"/> Operator Transfer<br><input type="checkbox"/> DCS<br><input type="checkbox"/> 100% - Call Forward Only<br><input type="checkbox"/> 100% - Landline Only<br><input type="checkbox"/> 100% - Mobile<br><input type="checkbox"/> POC Only<br><input type="checkbox"/> Standard<br><input type="checkbox"/> Std Response | <input type="checkbox"/> 10 minutes<br><input type="checkbox"/> 10 minutes | 0                            | <input type="checkbox"/> |

Call 1: Phone 1 Call 2: Phone 2 Call 3: Phone 3 Call 4: Phone 4 Call 5: Phone 5 12



*Dialing Round is an attempt to reach the customer by dialing a sequence of phone numbers with a defined delay between call attempts.*

The "Requeue" option is a setting (check box) that determines which outcomes to requeue when the strategy is applied to additional passes on a campaign.

When "Requeue" is checked, the system will add accounts to a requeue campaign for which this was the best outcome of the parent campaign.

- The Requeue option is unselected by default

The example below illustrates the outcomes that the user may configure for requeued campaigns.

| Strategy/Outcome  | Dial Another Number  | Try Another Round of Dialing | Requeue                  |
|---|--|------------------------------|--------------------------|
| <input type="checkbox"/> Custom Response<br><input type="checkbox"/> 100% - All Phone Types<br><input type="checkbox"/> Customer Hang Up<br><input type="checkbox"/> Left Message<br><input type="checkbox"/> Customer Not Available<br><input type="checkbox"/> Right Party Answered to Message<br><input type="checkbox"/> Wrong Party Answered to Message<br><input type="checkbox"/> Transfer Hang Up<br><input type="checkbox"/> Miscellaneous<br><input type="checkbox"/> No Connection<br><input type="checkbox"/> Not Made<br><input type="checkbox"/> Operator Transfer<br><input type="checkbox"/> DCS<br><input type="checkbox"/> POC Only<br><input type="checkbox"/> Standard<br><input type="checkbox"/> Std Response | <input type="checkbox"/> 10 minutes<br><input type="checkbox"/> 10 minutes<br><input type="checkbox"/> 10 minutes<br><input type="checkbox"/> 10 minutes | 0                            | <input type="checkbox"/> |







Call 1: Phone 1 12

## 6.1 Strategies Manager - LiveVox Voice Portal

Page 4 of 4

Each unique strategy can be used for the initial pass on a file. Only strategies with at least one selected Requeue result can be used on the subsequent requeue files that are generated. For a multipurpose strategy (both Original and Requeue) the user may select the appropriate phone fields and arrange them into the order they should be dialed. A multipurpose strategy should also have the appropriate call outcomes that will be redialed on any subsequent pass. The selected Requeue outcomes will only apply to a requeue pass and will not affect the initial pass of a dialing campaign.

Additional options available in the Strategy Manager footer:

-  Rename the selected strategy
-  Add a new strategy
-  Copy the selected strategy
-  Delete the selected strategy
-  Save adjusted settings
-  Length of the dialing sequence

The length of the dialing sequence can be configured to allow for up to 30 phones.



#### Related Topics

[Creating Dialing Strategies](#)

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PA67

## CREATING A NEW DIALING STRATEGY FOR A CAMPAIGN

- To create a new dialing strategy, select the 'Add' button from the menu tool bar at the lower right corner of the Strategies window.
- You will receive a 'Rename Strategy' pop-up box to select the name for your new strategy. Be sure to use only Alpha numeric characters in the new strategy name. Symbols such as apostrophes and underscores are not allowed. Select 'OK' to save your new strategy name. Select Cancel to exit the new strategy creation.
- Once a new name has been selected and saved by pressing the OK button, your new strategy will appear within the Strategies window.

| Strategy/Delay   | Dial Another Number                 | Try Another Round of Dialing Interval | Response |                          |
|--|-------------------------------------|---------------------------------------|----------|--------------------------|
| <input checked="" type="checkbox"/> Custom Feature       |                                     |                                       |          |                          |
| <input checked="" type="checkbox"/> Ring Strategy        |                                     |                                       |          |                          |
| <input type="checkbox"/> Customer Hang Up                |                                     |                                       |          |                          |
| <input checked="" type="checkbox"/> Left Message         |                                     |                                       |          |                          |
| <input type="checkbox"/> Customer Not Available          | <input type="checkbox"/>            | 10 minutes                            | 0        | <input type="checkbox"/> |
| <input type="checkbox"/> Machine Left Message            | <input checked="" type="checkbox"/> | 10 minutes                            | 0        | <input type="checkbox"/> |
| <input type="checkbox"/> Right Party Answered to Message | <input type="checkbox"/>            | 10 minutes                            | 0        | <input type="checkbox"/> |
| <input type="checkbox"/> Speaker Answered to Message     | <input type="checkbox"/>            | 10 minutes                            | 0        | <input type="checkbox"/> |
| <input type="checkbox"/> Invalid Ring Up                 |                                     |                                       |          |                          |
| <input type="checkbox"/> No Answer                       |                                     |                                       |          |                          |
| <input type="checkbox"/> No Connection                   |                                     |                                       |          |                          |
| <input type="checkbox"/> Not Match                       |                                     |                                       |          |                          |
| <input type="checkbox"/> Operator Transfer               |                                     |                                       |          |                          |
| <input type="checkbox"/> Stop                            |                                     |                                       |          |                          |
| <input checked="" type="checkbox"/> Stop                 |                                     |                                       |          |                          |
| <input type="checkbox"/> Customer Hang Up                |                                     |                                       |          |                          |
| <input type="checkbox"/> Left Message                    |                                     |                                       |          |                          |
| <input type="checkbox"/> Invalid Ring Up                 |                                     |                                       |          |                          |
| <input type="checkbox"/> No Answer                       |                                     |                                       |          |                          |
| <input type="checkbox"/> No Connection                   |                                     |                                       |          |                          |
| <input type="checkbox"/> Not Match                       |                                     |                                       |          |                          |
| <input type="checkbox"/> Operator Transfer               |                                     |                                       |          |                          |
| <input type="checkbox"/> Stop                            |                                     |                                       |          |                          |
| <input type="checkbox"/> Stop Only                       |                                     |                                       |          |                          |
| <input type="checkbox"/> Standard                        |                                     |                                       |          |                          |
| <input type="checkbox"/> Stop Request                    |                                     |                                       |          |                          |

- The new strategy can now be modified to take the appropriate actions for each specific outcome.



## 6.2 Creating a New Dialing Strategy for a Campaign - LiveVox Voice Portal

Page 2 of 2

### Related Topics

[Creating Dialing Strategies](#)

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PA69

## CONTACT TIMING

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This section covers how to prioritize the dialing of campaigns by identifying accounts that fall into 'prime time' windows by Time Zone and applying higher dialing priorities to those accounts while they are in "prime time". The following items are reviewed in this section:

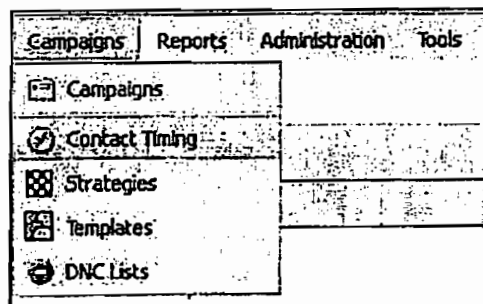
### 7.1 Curfew Only

### 7.2 Contact Timing Strategy

#### 7.2.1 Prioritized Dialing

#### 7.2.2 Restricted Dialing

- Navigate to the Contact Timing UI by selecting the 'Contact Timing' link from the Campaigns drop down menu from the main Voice Portal menu.



### Related Topics

[Curfew Only](#)

[Contact Timing Strategy](#)

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## INTRODUCTION

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This User Guide is designed to provide the basic guidelines to navigate the LiveVox voice portal in the most efficient and effective manner.

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## CONTACT TIMING

This section covers how to prioritize the dialing of campaigns by identifying accounts that fall into 'prime time' windows by Time Zone and applying higher dialing priorities to those accounts while they are in "prime time". The following items are reviewed in this section:

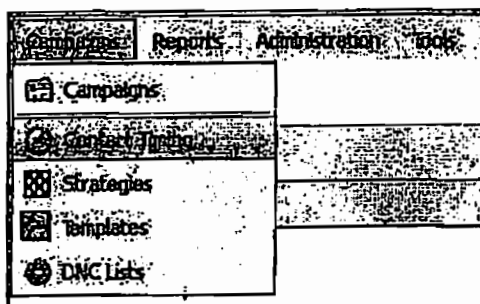
### 7.1 Curfew Only

### 7.2 Contact Timing Strategy

#### 7.2.1 Prioritized Dialing

#### 7.2.2 Restricted Dialing

- Navigate to the Contact Timing UI by selecting the 'Contact Timing' link from the Campaigns drop down menu from the main Voice Portal menu.



### Related Topics

[Curfew Only](#)

[Contact Timing Strategy](#)

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## CONTACT TIMING STRATEGY

The Contact Timing strategy allows you to maximize your dialing efforts by calling each account during self-defined "Prime Time" windows. The user defines, for each skill, which hours of the day are considered "Prime Time" hours. The user has the ability to define weekday and weekend prime time hours for both the morning and the evening.

There are two separate options under Contact Timing: Prioritized Dialing and Restricted Dialing.

### Related Topics

[Contact Timing](#)

[Prioritized Dialing](#)

[Restricted Dialing](#)

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**PRIORITIZED DIALING**

When using the Prioritized Dialing strategy on a skill, all phone #'s that meet the prime time calling hours are dialed first. When there are no phone #'s left to call within the prime time calling hour zones, the file begins dialing using the Curfew Only strategy (Follow the Sun). Prime time phone numbers are given top priority.

| Region   | Prime Time    |               |               |               |               |               |
|--|---------------|---------------|---------------|---------------|---------------|---------------|
|  | Monday        |               | Saturday      |               | Sunday        |               |
|  | Morning       | Evening       | Morning       | Evening       | Morning       | Evening       |
| <input checked="" type="checkbox"/> Not Restricted     | 08:00 - 09:00 | 18:00 - 19:00 | 08:00 - 09:00 | 18:00 - 19:00 | 08:00 - 09:00 | 18:00 - 19:00 |
| <input checked="" type="checkbox"/> Custom Prioritized | 08:00 - 10:00 | 17:00 - 19:00 | 08:00 - 11:00 | 17:00 - 20:00 | 08:00 - 10:00 | 17:00 - 21:00 |
| <input checked="" type="checkbox"/> Curfew Restricted  | 08:00 - 10:00 | 17:00 - 21:00 | 08:00 - 10:00 | 17:00 - 19:00 | 08:00 - 11:00 | 17:00 - 19:00 |

**Related Topics**

[Contact Timing Strategy](#)

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**RESTRICTED DIALING**

When using the Restricted Dialing strategy on a skill, only phone numbers that meet the prime time calling hours are dialed. Using this strategy ensures that each attempt is made during the defined prime time hours. When there are no phone numbers left in a file that fall within the defined prime time hours, no calls will go out until another defined prime time window begins. Non-prime time accounts are *restricted* from dialing.

| Regime             | Prime Time    |               |               |               |               |               |
|--------------------|---------------|---------------|---------------|---------------|---------------|---------------|
|                    | Monday        |               | Tuesday       |               | Sunday        |               |
|                    | Morning       | Evening       | Morning       | Evening       | Morning       | Evening       |
| Std. Prioritized   | 08:00 - 09:00 | 17:00 - 20:00 | 08:00 - 09:00 | 18:00 - 19:00 | 08:00 - 09:00 | 18:00 - 19:00 |
| Custom Prioritized | 08:00 - 12:00 | 17:00 - 18:00 | 08:00 - 11:00 | 17:00 - 20:00 | 08:00 - 12:00 | 17:00 - 21:00 |
| Custom Restricted  | 08:00 - 10:00 | 17:00 - 21:00 | 08:00 - 18:00 | 17:00 - 18:00 | 08:00 - 11:00 | 17:00 - 18:00 |

The contact timing strategies can be set at the skill level by clicking on the 'Properties' icon at the skill level. Once you select your desired Prime Time Regime press the 'Save' button to enable your selection.

Call Center Phone Numbers (for the skill)

Operator Number: 9876543936

Caller ID: ☐ Local ☐ File-Based ☒ Fixed: 5666666666

Customer Callback Number: 5555555555

Properties of the Skill

Prime Time Regime: **Std Prioritized**

Cancel

Campaign Legend: [Icons]



## 7.2.2 Restricted Dialing - LiveVox Voice Portal

Page 2 of 2

### Related Topics

[Contact Timing Strategy](#)

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PA77

## COMPLIANCE

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The following items are reviewed in the Compliance section:

- 8.1 Viewing current State Dialing Hours Restrictions
- 8.2 Configuring a Compliance Profile
  - 8.2.1 Add or Edit Curfews
  - 8.2.2 Add or Edit Blocks
- 8.3 Assigning a Compliance Profile to a Skill/Call Center

### Related Topics

[Viewing current State Dialing Hours Restrictions](#)  
[Configuring a Compliance Profile](#)  
[Assigning a Compliance Profile to a Skill/Call Center](#)

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## 8.1 Viewing current State Dialing Hours Restrictions - LiveVox Voice Portal

Page 1 of 4

**VIEWING CURRENT STATE DIALING HOURS RESTRICTIONS**

This section covers the State Dialing Hours Restriction of the Compliance page. All users can view the following:

- State/Province and Area code dialing hours restriction policies.
- State/Province and Area code exclusions on dialing and/or leaving messages.
- Skills/Call Centers these policies are applied to.



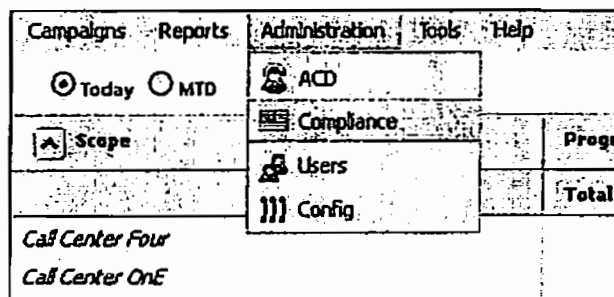
*Site-specific compliance rules are not checked when scheduling callbacks, but are enforced when the callback launches. An error message will appear to the agent at the time of the attempted dial if outside of compliance.*

If a state/area code does not have a specific setting assigned in the Compliance section the LiveVox State Dialing Hours Restriction Defaults will take effect. These defaults are described below:

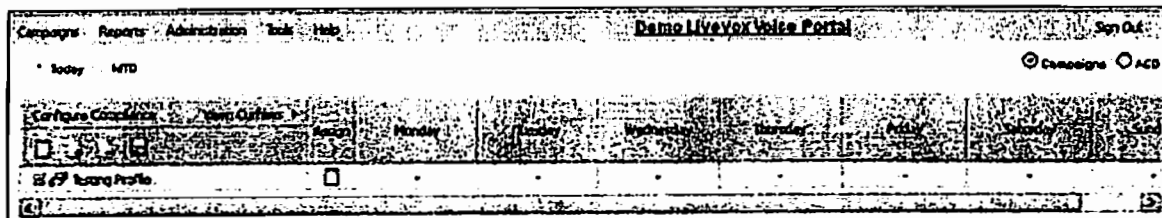
- Default dialing hours window: 8:00 AM - 9:00 PM, except for the following:
  - Nevada: 9 AM - 8 PM
  - Pennsylvania: Sundays: 1:30 PM - 9 PM. Weekdays 9 AM - 9 PM.

To view your non-default State Dialing Hours Restriction policies follow these instructions:

- Navigate to the Compliance UI by selecting the 'Compliance' link from the Administration drop down menu from the main Voice Portal menu.



- You will be presented with the list of non-default dialing profiles available on your site:

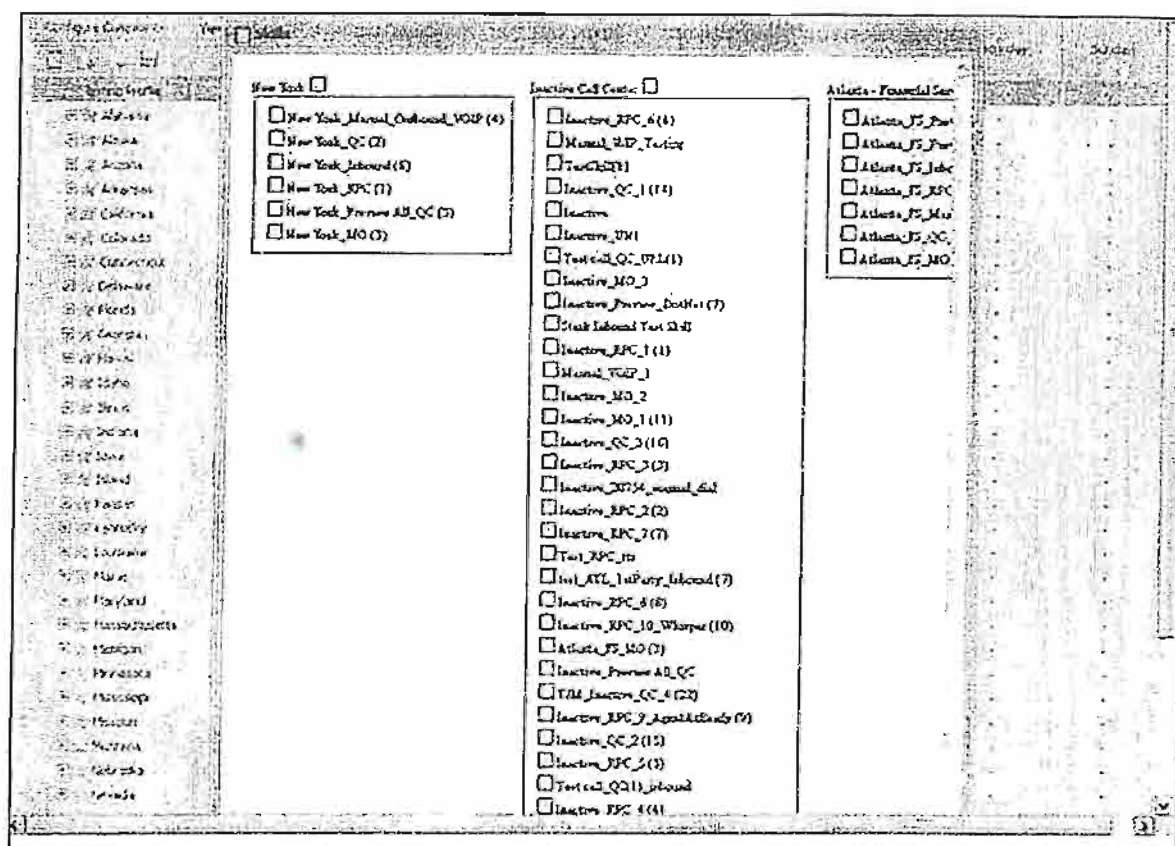


- To view the skills or call centers to which a profile is applied select the clipboard icon in the Assign column.

PA79

## 8.1 Viewing current State Dialing Hours Restrictions - LiveVox Voice Portal

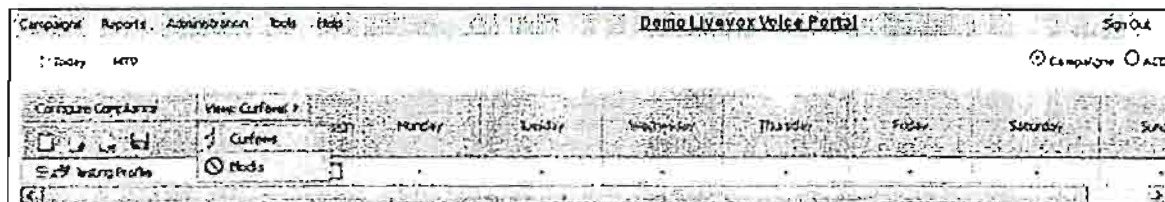
Page 2 of 4



- From the View dropdown you can select to view Curfews or Blocks. The Curfews section shows allowable hours that differ from the LiveVox default. The Blocks section shows prohibitions on dialing or leaving answering machine messages.



All times displayed are EST times.



- Selecting any compliance profile will allow users to view all states/provinces. Curfews or blocks assigned at either State/province level will be displayed. The following example shows the custom curfews for each state.

## 8.1 Viewing current State Dialing Hours Restrictions - LiveVox Voice Portal

Page 3 of 4

| Configure Compliance  | View Curfew | Assign | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday | Sunday |
|---|-------------|--------|--------|---------|-----------|----------|--------|----------|--------|
| <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>  |             |        |        |         |           |          |        |          |        |
| <input type="checkbox"/> Alabama<br><input type="checkbox"/> Alaska<br><input type="checkbox"/> Arizona<br><input type="checkbox"/> Arkansas<br><input type="checkbox"/> California<br><input type="checkbox"/> Colorado<br><input type="checkbox"/> Connecticut<br><input type="checkbox"/> Delaware<br><input type="checkbox"/> Florida<br><input type="checkbox"/> Georgia<br><input type="checkbox"/> Hawaii<br><input type="checkbox"/> Idaho<br><input type="checkbox"/> Illinois<br><input type="checkbox"/> Indiana<br><input type="checkbox"/> Iowa<br><input type="checkbox"/> Kansas<br><input type="checkbox"/> Kentucky<br><input type="checkbox"/> Louisiana<br><input type="checkbox"/> Maine<br><input type="checkbox"/> Maryland<br><input type="checkbox"/> Massachusetts<br><input type="checkbox"/> Michigan<br><input type="checkbox"/> Minnesota<br><input type="checkbox"/> Mississippi<br><input type="checkbox"/> Missouri<br><input type="checkbox"/> Montana<br><input type="checkbox"/> Nebraska<br><input type="checkbox"/> Nevada |             |        |        |         |           |          |        |          |        |

- Expanding each state/province will display a list of area codes within that region. Here you may view the restrictions for each individual area code.

| Configure Compliance   | View Curfew | Assign | Monday | Tuesday | Wednesday | Thursday | Friday   | Saturday                            | Sunday |
|--|-------------|--------|--------|---------|-----------|----------|--|-------------------------------------|--------|
| <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>   |             |        |        |         |           |          |  |                                     |        |
| <input type="checkbox"/> South Carolina<br><input type="checkbox"/> South Dakota<br><input type="checkbox"/> Tennessee<br><input type="checkbox"/> Texas<br>--- 210<br>--- 214<br>--- 254<br>--- 261<br>--- 325<br>--- 361<br>--- 409<br>--- 430<br>--- 432<br>--- 409 |             |        |        |         |           |          |  | 10:00am - 9:29pm<br>1:00pm - 9:59pm |        |
|  |             |        |        |         |           |          | 1:00pm - 4:00pm<br>11:00am - 9:59pm<br>2:00pm - 9:59pm |                                     |        |

PA81

## 8.1 Viewing current State Dialing Hours Restrictions - LiveVox Voice Portal

Page 4 of 4

### Related Topics Compliance

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PA82

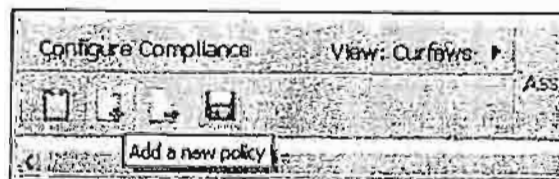
## CONFIGURING A COMPLIANCE PROFILE

A new compliance profile can be created to enact new allowable hours or dialing/messaging restrictions. These restrictions can be applied to an individual skill, multiple skills, or call centers. Customer is responsible for ensuring that it is compliant with applicable law regarding dialing hours.

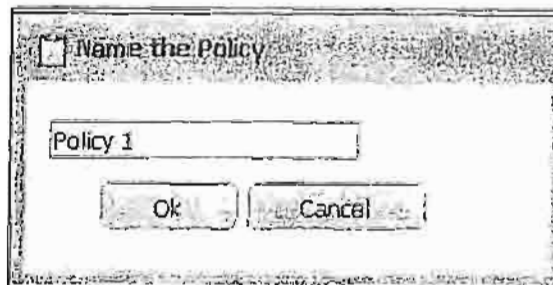


*User must have Sysadmin or IT User level access to adjust Profiles.*

- Select the "Add a new policy" button from the upper left pane.



- Type in the name of your new policy and select "Ok".



- Create allowable hours from the "Curfews" view or implement restrictions on leaving messages or calling using the "Blocks" view. Decide which skill(s)/call center(s) this should apply to using the 'Apply' button.

### Related Topics

[Compliance](#)  
[Add or Edit Curfews](#)  
[Add or Edit Blocks](#)

---

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## 8.2.1 Add or Edit Curfews - LiveVox Voice Portal

Page 1 of 2

**ADD OR EDIT CURFEWS**

Curfews (allowable time to dial) are set on a day-of-the-week basis for either a State/Province or area code level. Area codes for each State/Province are visible after selecting the plus symbol to the left of the state name. After determining what your restriction should be select the appropriate day of the week and region from your profile's settings.

| Configure Curfew | View Curfew | Region         | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday        | Sunday          |
|------------------|-------------|----------------|--------|---------|-----------|----------|--------|-----------------|-----------------|
|                  |             | Oregon         |        |         |           |          |        |                 |                 |
|                  |             | ... 503        |        |         |           |          |        |                 |                 |
|                  |             | ... 541        |        |         |           |          |        |                 |                 |
|                  |             | ... 971        |        |         |           |          |        |                 |                 |
|                  |             | Pennsylvania   |        |         |           |          |        | 9:00am - 8:59pm | 1:30pm - 6:59pm |
|                  |             | Puerto Rico    |        |         |           |          |        |                 |                 |
|                  |             | Rhode Island   |        |         |           |          |        |                 |                 |
|                  |             | South Carolina |        |         |           |          |        |                 |                 |

- A window with optional hours appears. Choose a preconfigured hour range or choose the "ab" button to select your own hours.

- Use the dropdown options that appear to input your start hour/minute and end hour/minute. Select the green checkmark to save your new dialing window. Keep in mind all times are in EST.

- The selected dialing window should appear in bold font for the region and day you selected.

PA84



| Configure Compliance  | View: Curfews | Assign | Monday          | Tuesday |
|---|---------------|--------|-----------------|---------|
| <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |               |        |                 |         |
| <input type="checkbox"/> <b>503</b>   |               |        | 5:00am - 9:00am |         |
| <input type="checkbox"/> <b>541</b>   |               |        |                 |         |
| <input type="checkbox"/> <b>971</b>   |               |        |                 |         |
| <input checked="" type="checkbox"/> <b>Pennsylvania</b>   |               |        |                 |         |

- To revert to the LiveVox State Dialing Hours Restriction default instead of your choice, click on the time period and select "Revert to state/policy".

- Save your changes using the floppy disk symbol. Your settings are saved when the font changes from bold to regular.

| Configure Compliance   | View: Curfews | Assign | Monday          |
|--|---------------|--------|-----------------|
| <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> |               |        |                 |
| <input type="checkbox"/> <b>503</b>  |               |        | 5:00am - 9:00am |
| <input checked="" type="checkbox"/> <b>Pennsylvania</b>  |               |        |                 |
| <input checked="" type="checkbox"/> <b>Puerto Rico</b>   |               |        |                 |

#### Related Topics

[Configuring a Compliance Profile](#)

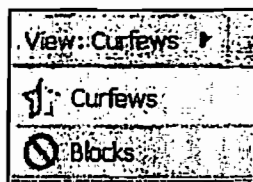
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## 8.2.2 Add or Edit Blocks - LiveVox Voice Portal

Page 1 of 2

**ADD OR EDIT BLOCKS**

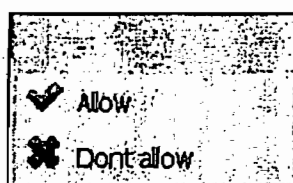
- Select View->Blocks to view and adjust Blocks in place, which restrict dialing or leaving automated messages on Answering Machines.



Blocks are set on a day-of-the-week basis for either a State/Province or area code level. Area codes for each State/Province are visible after selecting the plus symbol to the left of the state name. After determining what your restriction should be select the appropriate day of the week and region for either dialing ("Dial") or leaving messages ("Msgs") column.

| Configure Curfews        | View Blocks              | Action                   | Monday |      | Tuesday |      | Wednesday |      | Thursday |      | Friday |      | Saturday |      | Sunday |      |
|--------------------------|--------------------------|--------------------------|--------|------|---------|------|-----------|------|----------|------|--------|------|----------|------|--------|------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Dial   | Msgs | Dial    | Msgs | Dial      | Msgs | Dial     | Msgs | Dial   | Msgs | Dial     | Msgs | Dial   | Msgs |
| Testing Profile          |                          |                          | -      | -    | -       | -    | -         | -    | -        | -    | -      | -    | -        | -    | -      | -    |
| Alabama                  |                          |                          | -      | -    | -       | -    | -         | -    | -        | -    | -      | -    | -        | -    | -      | -    |
| Alaska                   |                          |                          | -      | -    | -       | -    | -         | -    | -        | -    | -      | -    | -        | -    | -      | -    |
| Arizona                  |                          |                          | -      | -    | -       | -    | -         | -    | -        | -    | -      | -    | -        | -    | -      | -    |
| Arkansas                 |                          |                          | -      | -    | -       | -    | -         | -    | -        | -    | -      | -    | -        | -    | -      | -    |
| California               |                          |                          | -      | -    | -       | -    | -         | -    | -        | -    | -      | -    | -        | -    | -      | -    |
| Colorado                 |                          |                          | -      | -    | -       | -    | -         | -    | -        | -    | -      | -    | -        | -    | -      | -    |
| 202                      |                          |                          | -      | -    | -       | -    | -         | -    | -        | -    | -      | -    | -        | -    | -      | -    |
| 719                      |                          |                          | -      | -    | -       | -    | -         | -    | -        | -    | -      | -    | -        | -    | -      | -    |
| 720                      |                          |                          | -      | -    | -       | -    | -         | -    | -        | -    | -      | -    | -        | -    | -      | -    |
| 970                      |                          |                          | -      | -    | -       | -    | -         | -    | -        | -    | -      | -    | -        | -    | -      | -    |

- You will be prompted to choose either neutral (LiveVox State Dialing Hours Restriction Default), 'Allow', or 'Don't Allow'.



- After making selections fonts will change to bold to indicate changes have not been saved.

PA86

## 8.2.2 Add or Edit Blocks - LiveVox Voice Portal

Page 2 of 2

| Configure Compliance                                | View: Blocks | Assign                              | Monday                              |                                     | Tuesday |      |
|---|--------------|-------------------------------------|-------------------------------------|-------------------------------------|---------|------|
|   |              |                                     | Dial                                | Msgs                                | Dial    | Msgs |
| <input checked="" type="checkbox"/> Testing Profile |              | <input checked="" type="checkbox"/> | -                                   | -                                   | -       | -    |
| <input checked="" type="checkbox"/> Alabama         |              |                                     | -                                   | -                                   | -       | -    |
| <input checked="" type="checkbox"/> Alaska          |              |                                     | -                                   | -                                   | -       | -    |
| <input checked="" type="checkbox"/> Arizona         |              |                                     | -                                   | -                                   | -       | -    |
| <input checked="" type="checkbox"/> Arkansas        |              |                                     | -                                   | -                                   | -       | -    |
| <input checked="" type="checkbox"/> California      |              |                                     | -                                   | -                                   | -       | -    |
| <input checked="" type="checkbox"/> Colorado        |              |                                     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | -       | -    |
| ''' 303   |              |                                     | -                                   | <input checked="" type="checkbox"/> | -       | -    |
| ''' 719   |              |                                     | -                                   | -                                   | -       | -    |
| ''' 720   |              |                                     | <input checked="" type="checkbox"/> | -                                   | -       | -    |
| ''' 970   |              |                                     | -                                   | <input checked="" type="checkbox"/> | -       | -    |
| <input checked="" type="checkbox"/> Connecticut     |              |                                     | -                                   | -                                   | -       | -    |

- Save your changes using the floppy disk symbol. Your settings are saved when the font changes from bold to regular.

| Configure Compliance                                | View: Blocks | Assign                              | Monday                              |                                     |
|---|--------------|-------------------------------------|-------------------------------------|-------------------------------------|
|   |              |                                     | Dial                                | Msgs                                |
| <input checked="" type="checkbox"/> Testing Profile |              | <input checked="" type="checkbox"/> | -                                   | -                                   |
| <input checked="" type="checkbox"/> Alabama         |              |                                     | -                                   | -                                   |
| <input checked="" type="checkbox"/> Alaska          |              |                                     | -                                   | -                                   |
| <input checked="" type="checkbox"/> Arizona         |              |                                     | -                                   | -                                   |
| <input checked="" type="checkbox"/> Arkansas        |              |                                     | -                                   | -                                   |
| <input checked="" type="checkbox"/> California      |              |                                     | -                                   | -                                   |
| <input checked="" type="checkbox"/> Colorado        |              |                                     | <input checked="" type="checkbox"/> | -                                   |
| ''' 303   |              |                                     | -                                   | <input checked="" type="checkbox"/> |
| ''' 719   |              |                                     | -                                   | -                                   |
| ''' 720   |              |                                     | <input checked="" type="checkbox"/> | -                                   |
| ''' 970   |              |                                     | -                                   | <input checked="" type="checkbox"/> |
| <input checked="" type="checkbox"/> Connecticut     |              |                                     | -                                   | -                                   |

## Related Topics

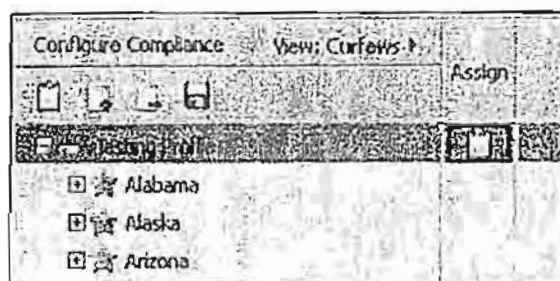
[Configuring a Compliance Profile](#)

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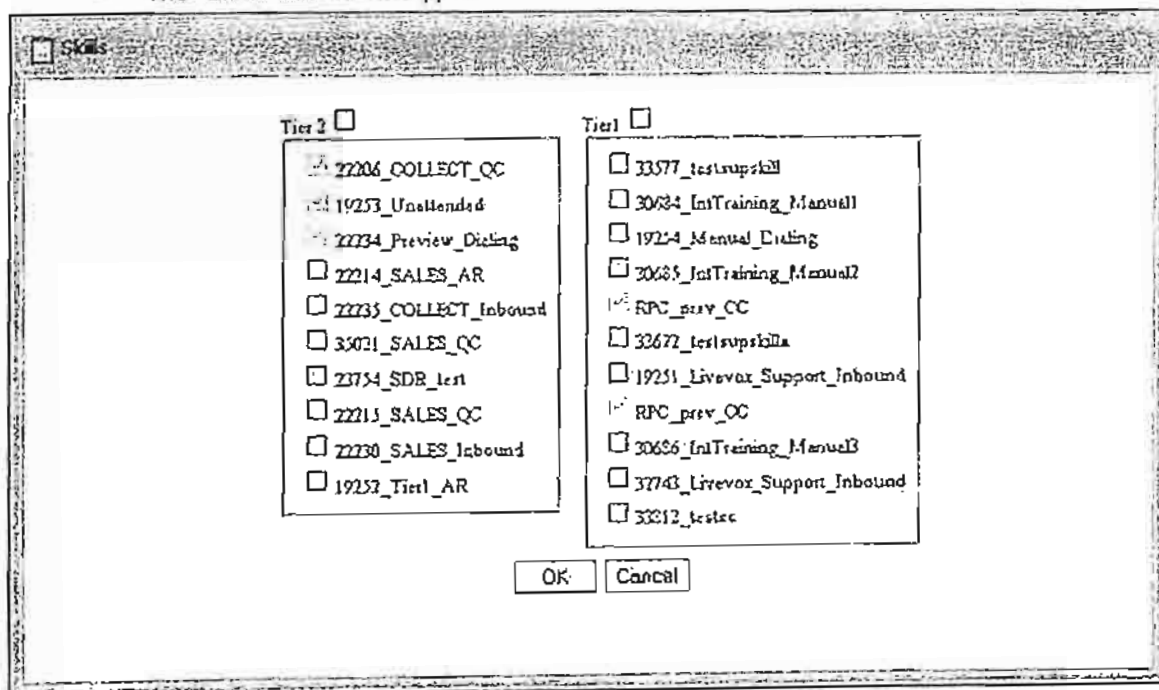
PA87

## ASSIGNING A COMPLIANCE PROFILE TO A SKILL/CALL CENTER

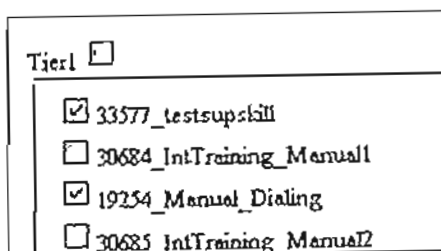
- Assign a policy to a skill/call center using the clipboard symbol next to the policy's name in the "Assign" column.



- The "Skills" window will appear.



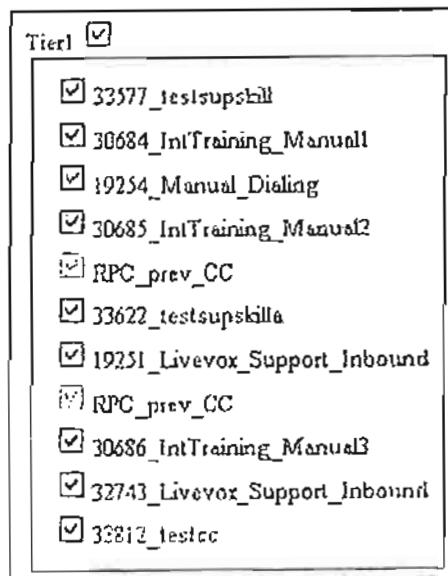
- Select individual skills using the checkbox next to their name.



- Select or deselect an entire call center using the checkbox next to its name.

## 8.3 Assigning a Compliance Profile to a Skill/Call Center - LiveVox Voice Portal

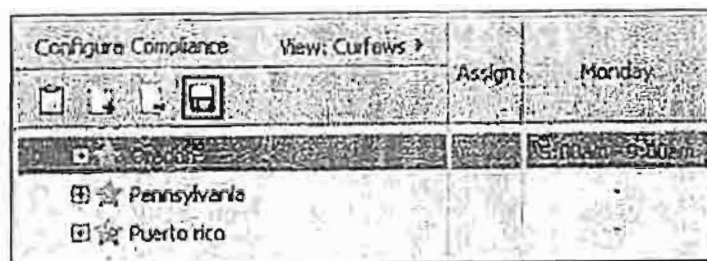
Page 2 of 3



Tier1 ☒

- ☒ 33577\_testsupskill
- ☒ 30684\_IntTraining\_Manual1
- ☒ 19254\_Manual\_Dialing
- ☒ 30685\_IntTraining\_Manual2
- ☒ RPC\_prev\_CC
- ☒ 33622\_testsupskilla
- ☒ 19251\_Livevox\_Support\_Inbound
- ☒ RPC\_prev\_CC
- ☒ 30686\_IntTraining\_Manual3
- ☒ 32743\_Livevox\_Support\_Inbound
- ☒ 33812\_testcc

- Once the skills or call centers match your intended policy select the 'OK' button. Select the floppy disk 'Save' button to save the skill/call center assignment changes.



Configure Compliance View: Curfew's →

Assign Monday

Group

- ☒ Pennsylvania
- ☒ Puerto Rico



A new policy cannot be applied to a skill until individual state or area code component has been added. The "Assign" symbol will not be visible but the message "Please customize the policy before assigning it to a skill" will be shown.

### 8.3 Assigning a Compliance Profile to a Skill/Call Center - LiveVox Voice Portal

Page 3 of 3

•  
**Related Topics**

Compliance

---

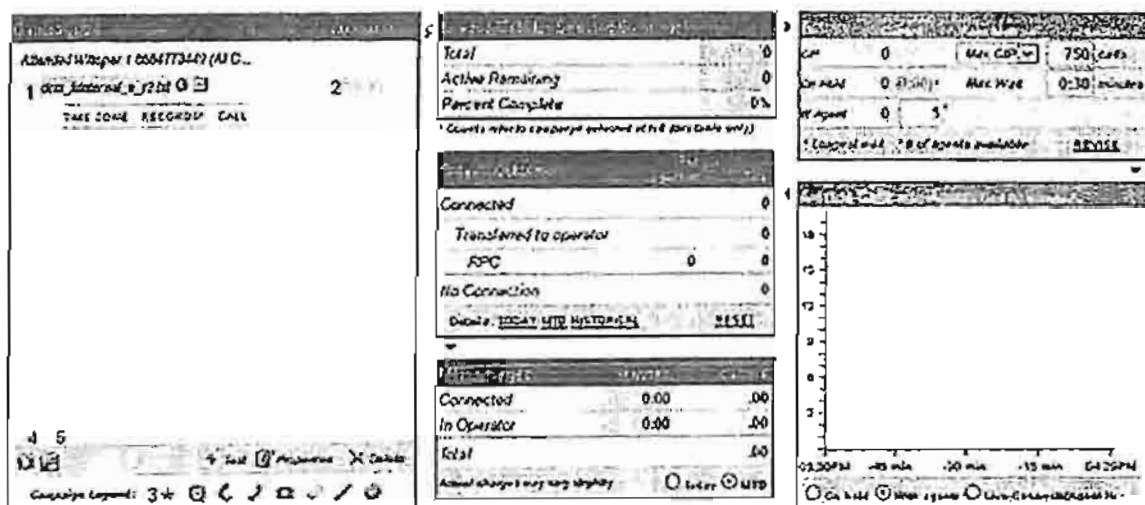
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PA90

## RUNNING A CAMPAIGN (EXECUTING A CAMPAIGN)

This section covers the process after a loaded campaign has been built. At this point managers are able to begin dialing on accounts. The following section illustrates how this is done, as well as some useful features that are used to control and change the properties of individual campaigns/files.

Navigate to the Skill page by right clicking on the selected campaign file in the Campaign Manager or by selecting the skill from the Skill view described in section 2.



- Loaded campaigns display below the skill name (1). Multiple calling campaigns can be loaded to any skill. Click on each campaign to select it before further action can take place. Up to 20 campaigns can play on a skill simultaneously.
- For each file, the option to detect answering machines and/or leave messages on detected answering machines is available by simply checking the MSG box (to leave messages) or the AMD box (to detect answering machines) next to the file name (2).








Messaging settings adjusted in this form will overwrite settings defined in the Campaign Manager section of the Voice Portal when the file was uploaded.

- For each highlighted campaign, one of 8 different icons will appear to the immediate right of the campaign file name. These icons represent the status of each campaign and are as follows (3):

|             |   |
|-------------|---|
| ★ Ready     | Ready to Play on demand. If blue the campaign has already been built.             |
| ⌚ Scheduled | Scheduled to play at a pre-set time. If blue the campaign has already been built. |
| ⚙ Loading   | System is preparing the campaign.   |

## 9 Running a Campaign (Executing a Campaign) - LiveVox Voice Portal

Page 2 of 3

|   |   |
|---|---|
|  <b>Playing</b>  | The campaign is active. Calls are being made.                     |
|  <b>Paused</b>   | Ready to resume playing.  |
|  <b>Done</b>     | The campaign has finished or been stopped.                        |
|  <b>Reported</b> | The campaign has finished or been stopped, and has been reported. |
|  <b>Error</b>    | The campaign file has encountered errors.                         |

- Highlighted campaigns are controlled with the 'play/pause' toggle button, and can be stopped before they finish with the 'stop' button (4). Stopped files will be sent to report and must be requeued to dial again.
- LiveVox allows for pre-building of the file before dialing by clicking on a file and then clicking on the wrench icon to pre-build the file (5).
- The LiveVox dashboard provides controls and data (real time and aggregate) at the campaign or skill level, depending on whether the skill name or individual campaign is highlighted.

PA92



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## **CAMPAIGN WINDOW FUNCTIONALITY**

---

This section covers how to edit campaign properties and look up information for call attempts via the customer lookup information function. The following items are reviewed in this section:

10.1 Editing Campaign Properties

10.2 Customer Information Lookup

### **Related Topics**

[Editing Campaign Properties](#)

[Customer Information Lookup](#)

---

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## EDITING CAMPAIGN PROPERTIES

For any given highlighted campaign, if the 'Properties' button is clicked, the phone numbers associated with that campaign/file will be displayed.



*You can only edit the properties of a paused campaign.*

To edit campaign properties, in the Skill Page click on 'Properties' icon when no campaign has been selected.

- Caller ID (CID) sources are configurable for individual skills. Please contact LV Client Services for assistance in configuring additional options. These options include:
  - 'Fixed' – single CID for the entire campaign, with a dropdown of selectable options.
  - 'File-based' – the CID utilized is assigned to each account in the campaign file
  - 'Local' – automatically selected number that is local or, if local number is unavailable, one that is reasonably proximate, from the Local Caller ID (LCID) package assigned to the skill that matches the attempted phone number's area code.
    - 'Local' option (in Red below) will only be displayed if the Local Caller ID feature is enabled:



*Caller ID Name will display as blank on the consumers' phone (In rare cases, issues with a local exchange carrier's systems may result in a legacy name displaying on a call recipient's caller ID. This error is outside of LiveVox's control. Please contact LiveVox if you become aware of such a display error)*

## 10.1 Editing Campaign Properties - LiveVox Voice Portal

Page 2 of 4

**Call Center Phone Numbers (for the skill)**

|            | Operator Number                  | Caller ID:                       | Callback Number                  |
|------------|----------------------------------|----------------------------------|----------------------------------|
| Fixed      | <input type="radio"/> 5555555555 | <input type="radio"/> 8884773448 | <input type="radio"/> 8158049948 |
| File-Based | <input type="radio"/>            | <input type="radio"/>            | <input type="radio"/>            |
| Local      | <input type="radio"/>            |                                  |                                  |

**Properties of the Skill**

Prime Time Region:

Max Attempts Per Day:

▪ If the Local Caller ID feature is not enabled, the following options will be available:

**Call Center Phone Numbers (for the skill)**

|            | Operator Number                  | Caller ID:                       | Callback Number                  |
|------------|----------------------------------|----------------------------------|----------------------------------|
| Fixed      | <input type="radio"/> 8007654321 | <input type="radio"/> 4055550199 | <input type="radio"/> 8888888888 |
| File-Based | <input type="radio"/>            | <input type="radio"/>            | <input type="radio"/>            |

**Properties of the Skill**

Prime Time Region:

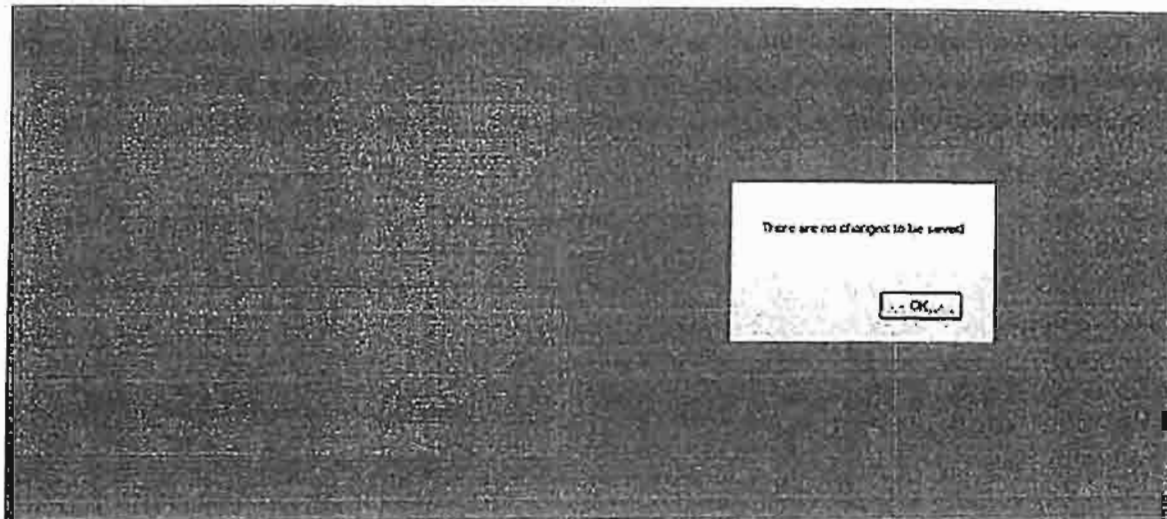
Max Attempts Per Day:



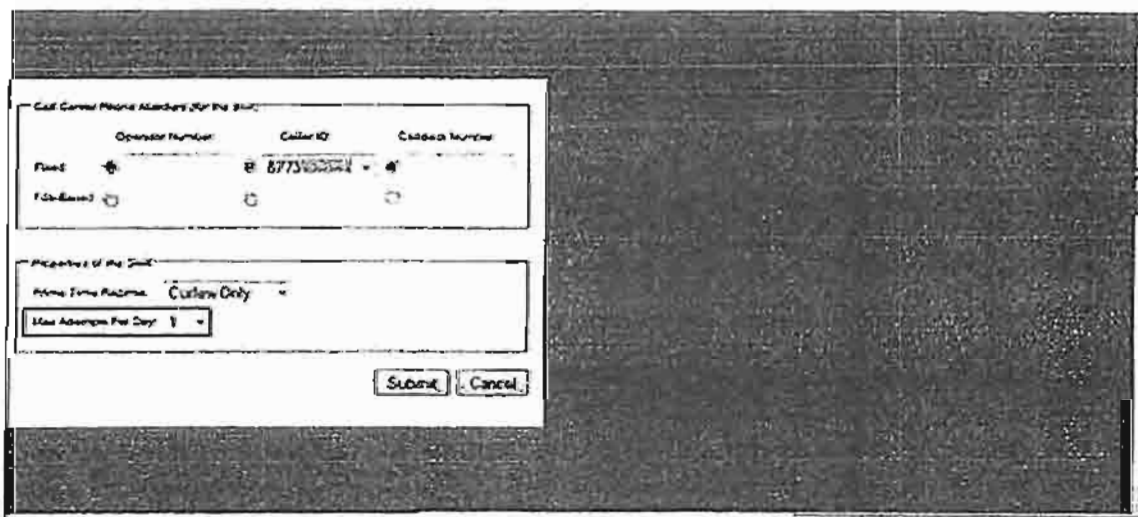
*These modifications are not permanent and any edited number (Operator Number, Caller ID Number, or Customer Call Back Number) will revert to the default setting once the campaigns are reported, or if a new file is loaded.*

An alert will be displayed and users will be unable to save modified numbers if an invalid number is entered.

PA96



- 'Max Attempts Per Day' skill properly allows you to set the maximum number of attempts that can be made to any particular account in a day for that skill.
  - For example, if you set max attempts for a skill (as shown below) to '1'. It means that only 1 call will be sent that day from the same account number. Once max attempts (1 in this case) are reached, the accounts will be excluded from dialing, reporting as 'Maximum Account Attempts Reached (Not Made)'. As it works in an intraday fashion, the same account numbers which got excluded today would be considered "new" the next day.



- Please note that this functionality works across those skills, and only those skills, which have this feature enabled. If a particular skill does not have this feature enabled, then there is no maximum number of attempts for calls using that skill. For total coverage of the maximum attempts per account per day feature, customers should consider enabling it across all skills. To enable and for additional details on this feature, please contact [client-services@livevox.com](mailto:client-services@livevox.com)
- Setting max attempts from the skill properties page can override any max attempts setting that may already exist for this skill.



*Max attempts cannot be set for manual skills.*

#### **Related Topics**

[Campaign Window Functionality](#)

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## CUSTOMER INFORMATION LOOKUP

All attempts for the past 31 days to a specific phone number on the currently selected skill can be viewed via the 'Customer Info' lookup button.

- Click on "Customer Info".
- Enter the 10 digit phone number (no spaces, no special characters) to be searched and click "Submit."
- All attempts for the past 31 days will be displayed on the screen (below). This will include Call Center, Skill, Name, Account, Agent, Date, Start/End Times, Campaign and Outcome. Summary can be exported to PDF or Excel format.

| Summary      |              | Export to: PDF Excel |         |       |                 |            |            |                                      |            |  |
|--------------|--------------|----------------------|---------|-------|-----------------|------------|------------|--------------------------------------|------------|--|
| Client       | LIVEVOX ECHO |                      |         |       |                 |            |            |                                      |            |  |
| Call Center  | Atlanta      |                      |         |       |                 |            |            |                                      |            |  |
| Skill        | Black Lotus  |                      |         |       |                 |            |            |                                      |            |  |
| Phone Number | 9255954457   |                      |         |       |                 |            |            |                                      |            |  |
| Start Date   | 10/16/2008   |                      |         |       |                 |            |            |                                      |            |  |
| End Date     | 11/17/2008   |                      |         |       |                 |            |            |                                      |            |  |
| Results      |              |                      |         |       |                 |            |            |                                      |            |  |
| CallCenter   | Skill        | Name                 | Account | Agent | Date            | Start      | End        | Campaign                             | Outcome    |  |
| Atlanta      | Black Lotus  | James Brown          | 3273449 |       | Mon Nov 17 2008 | 8:43:34 AM | 8:46:12 PM | test_instrument_11603_12345678901234 | Unanswered |  |
| Atlanta      | Black Lotus  | James Brown          | 3273449 |       | Mon Nov 17 2008 | 8:43:34 AM | 8:49:34 PM | test_instrument_11603_12345678901234 | Unanswered |  |

## 10.2 Customer Information Lookup - LiveVox Voice Portal

Page 2 of 2

### **Related Topics**

[Campaign Window Functionality](#)

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PA100



## **PACING AND AGENT MANAGEMENT**

---

This section provides an overview of the available pacing tools and how to effectively manage agents and the pacing of outbound campaigns with the LiveVox Voice Portal. The following items are reviewed in this section:

### **11.1 Skill Activity Box**

#### **11.1.1 Pacing Methods**

### **11.2 Real Time Graphs**

#### **11.2.1 Average Calls on Hold Graph**

#### **11.2.2 Average Calls with Agents Graph**

#### **11.2.3 Live Connects per Agent Hour**

### **11.3 ACD Queues**

#### **11.3.1 Pacing Information on ACD Queue Page**

#### **11.3.2 Agent Queue**

#### **11.3.3 Agent Monitoring**

#### **11.3.4 Accessing the Agent Monitoring Suite**

#### **11.3.5 Agent Monitoring by Client Auditors**

#### **11.3.6 Managing Agent Inactivity**

#### **11.3.7 Hold Queue**

#### **11.3.8 Sort ACD Queue**

### **Related Topics**

[Skill Activity Box](#)

[Real Time Graphs](#)

[ACD Queues](#)

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## SKILL ACTIVITY BOX

The skill activity box is located in the upper right-hand side of the Skill Page.

|                |           |                         |              |
|----------------|-----------|-------------------------|--------------|
| Activity       |           |                         |              |
| CIP            | 0         | Predict                 | 10 % faster  |
| On Hold        | 0 (0:00)* | Max Wait                | 0:55 minutes |
| W Agent        | 0 / 1*    |                         |              |
| * Longest wait |           | * # of agents available |              |
| REVISE         |           |                         |              |

The skill activity box allows you to view:

- The total number of calls that are in progress.
- The total number of calls that are currently with an agent.
- The total number of calls that are currently in the hold queue waiting to be transferred to an agent.
- The length of time on hold for the call that has been in the hold queue the longest.
- Pace Method selected and Throttle.
- The Max Wait time for the skill.

To update the pace method or throttle, enter the intended changes and select "Revise." The system will make the change and give you a confirmation that the changes have been made.

Definitions for terms in the Skill Activity Box:

- **CIP:** Calls In Progress – current # of lines in use
- **On Hold:** # of calls on hold waiting to be transferred to an agent. This is followed in parenthesis by the duration of the longest call on hold.
- For example, 2(0:30) would mean you have 2 calls on hold. The longest call on hold is 30 seconds.
- **Max Wait:** maximum amount of time a call can be on hold. Sets the time threshold of when the Voice Portal will play the Failed Operator Transfer message to the customer and then terminate the call. On inbound calls the customer is either disconnected and given the Failed Operator Transfer message or bridged to the voicemail number, depending on the skill-specific settings.
- For example, for a max wait of 55 seconds the value 0:55 should be used. For 1 minute 30 seconds the value 1:30 should be applied. For any value over 9:59, enter the number of seconds and the system will convert the value for you.
- **W Agent:** this displays the # of active calls with an agent followed by the # of agents logged into the skill.
- For example, 1/2 \* means that there are 2 agents logged in and 1 of them was on an active call.

### Related Topics

[Pacing and Agent Management](#)

[Pacing Methods](#)

## 11.1 Skill Activity Box - LiveVox Voice Portal

Page 2 of 2

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PA103

**PACING METHODS**

There are 3 types of Pacing Methods available: Abandon Rate (ACD v. 2.1.3)/ Predict (pre-ACD v. 2.1.3), #/Agent, and Max CIP.

- Abandon Rate (Available in ACD v. 2.1.3)
  - Sets line per agent based on a calculation of the number of abandoned calls vs. the number of successful transfers. System then determines the optimal time to launch calls in order to achieve target abandon rate.

|                |           |                         |              |
|----------------|-----------|-------------------------|--------------|
| CP             | 0         | Abandon Rate            | 5 %          |
| On Hold        | 0 (0:00)* | Max Wait                | 1:30 minutes |
| W Agent        | 0 : 0'    |                         |              |
| * Longest wait |           | * # of agents available | REVISE       |

- For example.

- A dialing manager has the pacing method set to lines per agent (#/agent) at a high throttle. After 25 attempted transfers, 10 calls are abandoned, giving an abandon rate of 40% (10 ÷ 25). The pacing method is then changed to Abandon Rate with an acceptable rate of 5%. Since the Caller Abandon Rate is currently 40%, the system will reduce the total number of lines per agent in order to compensate for the abandonment discrepancy. Calls will be launched more slowly in order to adjust down to the total lines per agent necessary to achieve 5% abandonment.

- Predict (Available in versions before ACD v2.1.3)
  - The predict algorithm is based on a number of factors calculated around a proprietary formula. The Predict pace method can be adjusted on a sliding scale of 0-100%. The throttle allows the user to tell the system to launch calls earlier in order to be more aggressive.



*Predictive pacing works best with more than 8-10 agents.*

|                |           |                         |               |
|----------------|-----------|-------------------------|---------------|
| CP             | 0         | Predict                 | 10 % throttle |
| On Hold        | 0 (0:00)* | Max Wait                | 0:55 minutes  |
| W Agent        | 0 : 1'    |                         |               |
| * Longest wait |           | * # of agents available | REVISE        |

- #/Agent (Lines per agent)
  - #/Agent (Lines per agent) paces based on the number of lines dialed for each agent in the Ready status. When using this pace method the number of agents in Ready status is multiplied by the value in the Throttle box.

- o For example:

- If the Throttle is set to 10 and 5 agents are in the "Ready" status, the max allowable Calls-in-progress will be 50.

| Activity                               | Current   | Max      | Throttle     | Wait   |
|--|-----------|----------|--------------|--------|
| CIP                                    | 0         |          | 7 lines      |        |
| On Hold                                | 0 (0:00)* | Max Wait | 0:55 minutes |        |
| W Agent                                | 0 / 1*    |          |              |        |
| * Longest wait * # of agents available |           |          |              | REVISE |

- Max CIP

- o This pacing method is built specifically for unattended campaigns. It dials a fixed number of lines regardless of the number of agents logged in or Ready.

| Activity                               | Current   | Max      | Throttle     | Wait   |
|--|-----------|----------|--------------|--------|
| CIP                                    | 0         | Max CIP  | 500 calls    |        |
| On Hold                                | 0 (0:00)* | Max Wait | 1:30 minutes |        |
| W Agent                                | 0 / 0*    |          |              |        |
| * Longest wait * # of agents available |           |          |              | REVISE |

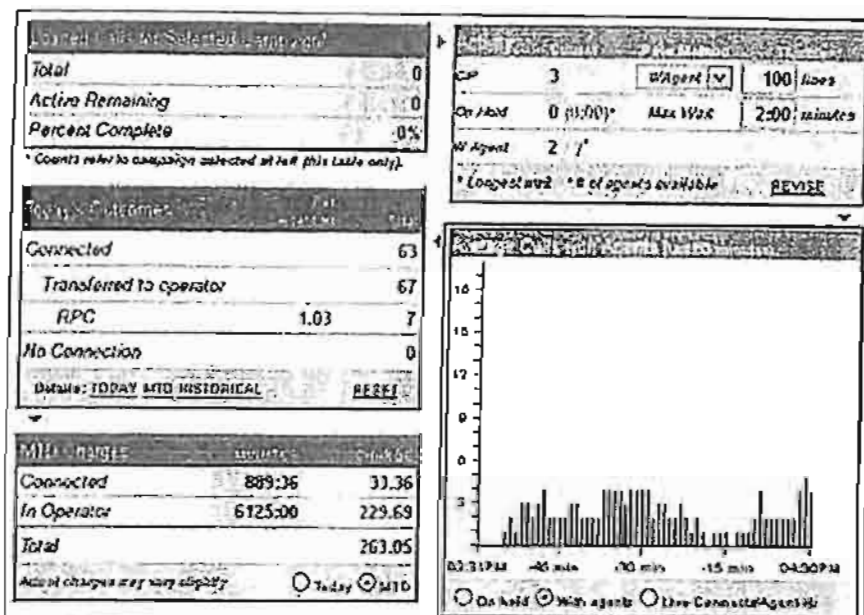
## Related Topics

[Skill Activity Box](#)

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## REAL TIME GRAPHS

Real-Time Graphs are available in the lower-right corner of the Skill page. A user can toggle back and forth between them by clicking on the radio buttons below the graph.



- Graphs are an aggregate of the past 1 hour.
- Graphs are updated in real-time.

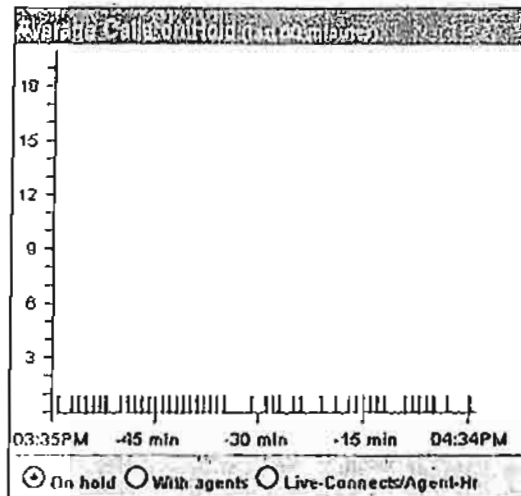
### Related Topics

[Pacing and Agent Management](#)  
[Average Calls on Hold Graph](#)  
[Average Calls with Agents Graph](#)  
[Live Connects per Agent Hour](#)

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**AVERAGE CALLS ON HOLD GRAPH**

This graph reflects the average number of calls on hold for the last hour.



- An average number of calls on hold that is above normal for your call center indicates you are most likely dialing too rapidly and indicates over pacing.
- An average number of calls on hold that is below normal for your call center indicates you are most likely dialing too slowly and indicates under pacing.

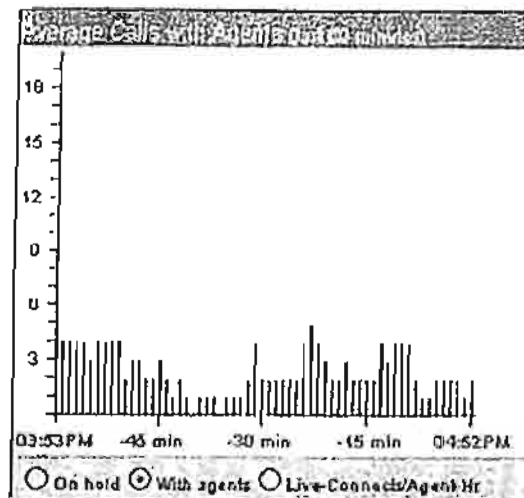
**Related Topics**

[Real Time Graphs](#)

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**AVERAGE CALLS WITH AGENTS GRAPH**

This graph reflects the average number of calls with an agent for the last hour.



- Having more agents on calls is a positive outcome; however, you will want to check your abandonment rate to make sure that you are not dropping too many calls in order to keep agents as busy as you require. (See Reporting)
- An average number of calls with agents that is below normal for your call center indicates you are most likely dialing too slowly and may be under pacing. Usually if you see this, you will have a low abandonment rate.



*These graphs provide real-time hourly aggregate data. This information is collected constantly, even when no campaign has been configured and run on the skill. If there are instances where no calls are with agents, ensure that the campaign has been active at that time.*

**Related Topics**

[Real Time Graphs](#)

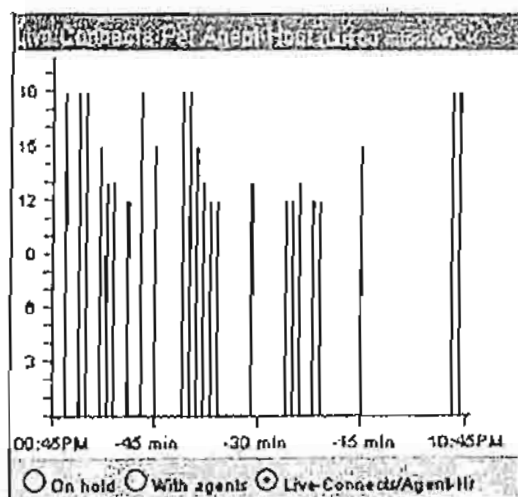
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**LIVE CONNECTS PER AGENT HOUR**

This graph reflects the total number of calls connected with an agent for the last hour.



This graph displays the calculation of agent connects/agent hour in one minute increments over the last 60 minutes. Agents in Ready, Wrapup or Incall statuses contribute to the agent hour value. This allows you to compare the volume of connected calls vs. the volume of agents logged in.

**Related Topics**

[Real Time Graphs](#)

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## ACD QUEUES

ACD Queues are accessed by clicking the "ACD" radio button in the top right portion of the main skill page. The scope of ACD queue page is controlled by the scope of the view on the campaign page for accessing the ACD queue. For example, if you are at the Enterprise campaign view you will see the Enterprise ACD queue. The call center campaign view is a call center ACD queue. The skill campaign view is a skill ACD queue. Additionally, the scope is defined by the access assigned to your user account.

|         |           |          |              |
|---------|-----------|----------|--------------|
| CIP     | 0         | Max CIP  | 70 calls     |
| On Hold | 0 (0:00)* | Max Wait | 8:00 minutes |
| W Agent | 0:0*      |          |              |

\* Longest wait \* # of agents available

REVISE

Once you are in the ACD Queue screen, two buttons appear on the upper left-hand side of the screen:

- Agent Queue
- Hold Queue

|         |           |          |              |
|---------|-----------|----------|--------------|
| CIP     | 3         | #Agent   | 1100         |
| On Hold | 0 (0:00)* | Max Wait | 0:01 minutes |
| W Agent | 2/8*      |          |              |

\* Longest wait \* # of agents available

REVISE

**Hold Queue Summary**

|               |   |               |          |
|---------------|---|---------------|----------|
| Calls on Hold | 0 | Top Hold Time | 00:01:00 |
|---------------|---|---------------|----------|

**Avg Agent Queue Times**

|                   |                   |                   |                   |                  |                  |                   |                   |          |
|-------------------|-------------------|-------------------|-------------------|------------------|------------------|-------------------|-------------------|----------|
| Avg. Waiting Time | 00:05:03          | Avg. Talking Time | 00:01:32          | Avg. Wrapup Time | 00:00:00         | Avg. Unavail Time | 00:07:10          |          |
| Last 30 Minutes   | Avg. Waiting Time | 00:02:32          | Avg. Talking Time | 00:01:50         | Avg. Wrapup Time | 00:00:09          | Avg. Unavail Time | 00:03:06 |

Monitor Data View Graphical View Sort Total Agents: 0

Additional information is provided in sections 11.3.2 and 11.3.3.

### Related Topics

- [Pacing and Agent Management](#)
- [Pacing Information on ACD Queue Page](#)
- [Agent Queue](#)
- [Agent Monitoring](#)
- [Accessing the Agent Monitoring Suite](#)
- [Agent Monitoring by Client Auditors](#)
- [Managing Agent Inactivity](#)
- [Hold Queue](#)
- [Sort ACD Queue](#)

**PACING INFORMATION ON ACD QUEUE PAGE**

Pacing controls for a selected skill will be displayed on the ACD queue page. This feature is disabled when multiple skills are viewed. Pacing controls are visible for read-only purposes and cannot be modified from the ACD queue page.

The screenshot displays the ACD Queue Page interface. At the top, there are tabs for 'Agent Queue' and 'Hold Queue'. Below these, a 'Hold Queue Summary' section shows 'Calls on Hold: 0' and 'Top Hold Times: 00:00:00'. A 'Longest wait if all agents available' warning is visible. The 'Avg Agent Queue Times' section provides metrics for 'Avg. Waiting Time: 00:00:43', 'Avg. Talking Time: 00:00:11', 'Avg. Wrap-up Time: 00:00:00', and 'Avg. Unavail. Time: 00:00:00'. Below this, 'Longest Wait Times' are listed: 'Avg. Waiting Time: 00:00:22', 'Avg. Talking Time: 00:00:57', 'Avg. Wrap-up Time: 00:00:14', and 'Avg. Unavail. Time: 00:00:00'. A 'Monitor' section at the bottom includes tabs for 'Detailed View', 'Graphical View', and 'SQL', with a 'Total Agents: 0' indicator. The 'Detailed View' tab is active, showing a table with columns: Call Name, Login ID, Name, State, Account, Customer Phone, Classification, and Duration. The table contains several rows of data, including calls in 'READY' and 'READY' states.

**Related Topics**

[ACD Queues](#)

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**AGENT QUEUE**

This queue will show you all of the agents that are currently logged in and their status on the system.

☒ Agent Queue ☐ Field Queue

|  |         |           |      |       |
|--|---------|-----------|------|-------|
| CP                                     | 1       | Agent     | 1000 | lines |
| Dr / Hdr                               | (00:00) | Max / Min | 1000 | 1000  |
| All Agent                              | 2/8     |           |      |       |
| * Longest wait * # of agents available |         | 2/8/11    |      |       |

**Field Queue Summary**    Calls on Hold: 0    Top Hold Price: 00:00:00

**Avg Agent Queue Times**    Avg. Waiting Time: 00:02:24    Avg. Talking Time: 00:04:11    Avg. Wrapup Time: 00:02:00    Avg. Unavailable Time: 00:10:20

**Last 30 Minutes**    Avg. Waiting Time: 00:02:22    Avg. Talking Time: 00:04:16    Avg. Wrapup Time: 00:02:00    Avg. Unavailable Time: 00:10:20

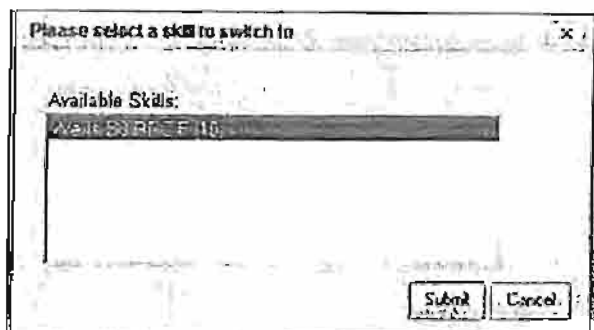
**Monitor**    **Grid View**    **Graphical View**    **SQL**    **Total Agents: 8**

| Call Name           | Logged ID  | Name          | Account       | State    | Customer Phone | Classification | Duration |
|---------------------|------------|---------------|---------------|----------|----------------|----------------|----------|
| Account: 1000000000 | 1000000000 | Account: 1000 | Account: 1000 | NOTREADY |                |                | 00:04:50 |
| Account: 1000000000 | 1000000000 | Account: 1000 | Account: 1000 | NOTREADY |                |                | 00:15:41 |
| Account: 1000000000 | 1000000000 | Account: 1000 | Account: 1000 | READY    |                |                | 00:03:15 |
| Account: 1000000000 | 1000000000 | Account: 1000 | Account: 1000 | READY    |                |                | 00:07:54 |
| Account: 1000000000 | 1000000000 | Account: 1000 | Account: 1000 | READY    |                |                | 00:03:15 |
| Account: 1000000000 | 1000000000 | Account: 1000 | Account: 1000 | READY    |                |                | 00:03:15 |

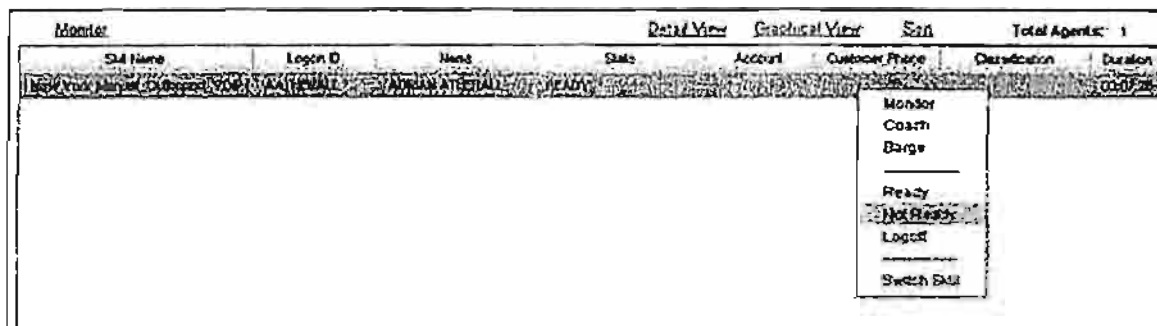
**FAQ - Agent Queue Management:**

- What status are the agents in?
  - The 'State' column will tell you the current status of an agent. Available statuses are:
    - **READY** – Agent is idle and ready to receive calls
    - **NOTREADY** – Agent is currently in a "break" status and is not able to receive calls. Outlined below are available Not Ready reason codes that can be activated upon request. This is a standard set that cannot be edited.
      - Lunch
      - Training
      - Break
      - Meeting
      - Tech
      - Difficulties
      - Other
    - **INCALL** – Agent is currently on an active call.
    - **WRAPUP** – Agent has completed active call, is currently in wrapup state. The maximum wrapup time can be implemented and adjusted for each individual agent.

- **PREVIEW DIALING** - Agent is in Preview Dialing mode with the option to dial, skip, or enter and dial another phone number manually.
- **INCALL (Inbound)** - Agent is currently on an active inbound call.
- Are they in a status that would enable them to receive a LiveVox call?
  - Agents can only receive a LiveVox call if they are in a "Ready" status
  - The system will only make outbound calls based upon the number of agents in a "Ready" status.
- How long have they been in any given status?
  - The duration column will show you how long an agent has been in their current status.
- Managers have the ability to switch an agent from one skill to another.
  - If the agent is in "READY" or "NOTREADY" state, then the agent is immediately switched to the new skill.
  - If the agent is in any other state, then the request is queued and the agent is switched to the new skill after changing to "READY" or "NOT READY".
  - Can be done by right clicking on the agent in the ACD screen and choosing "Switch Skill" (see Agent Queue screen shot above).
  - Choose the skill that you would like to switch the agent to and click on 'Submit'.



- The agent will receive a screen pop advising of the switch. The agent will need to follow the directions on the screen. Once completed, the agent will be logged into the new skill.
- Managers are able to change the states of agents currently in "Ready", "Not Ready" or "Wrap up" states.
  - From "Ready" to "Not Ready" or "Logoff"
  - From "Not Ready" to "Ready" or "Logoff"



### 11.3.2 Agent Queue - LiveVox Voice Portal

Page 3 of 3

- A validation step is available to confirm the change of the agent state. Please review the highlighted agent before clicking 'OK' to ensure changes are applied to the correct agent. Once a change is made, the new state of the agent will be displayed in the ACD queue.

#### **Related Topics**

[ACD Queues](#)

---

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PA114

**AGENT QUEUE**

This queue will show you all of the agents that are currently logged in and their status on the system.

☒ Agent Queue ☐ Hold Queue

|  |        |          |        |          |
|--|--------|----------|--------|----------|
| Call                                       | 1      | Agent    | 1/1/11 | Time     |
| On Hold                                    | 1/1/11 | Max Hold | 1/1/11 | Max Hold |
| Agent                                      | 2/1/11 |          |        |          |
| Longest wait # of agents available: 2/1/11 |        |          |        |          |

**Hold Queue Summary:** Calls on Hold: 0 Top Hold Time: 00:00:00

**Avg Agent Queue Times:** Avg. Waiting Time: 00:05:34 Avg. Talking Time: 00:04:41 Avg. Wrapup Time: 00:00:00 Avg. Unavail Time: 00:10:20

**Last 30 Minutes:** Avg. Waiting Time: 00:02:53 Avg. Talking Time: 00:01:30 Avg. Wrapup Time: 00:00:00 Avg. Unavail Time: 00:03:06

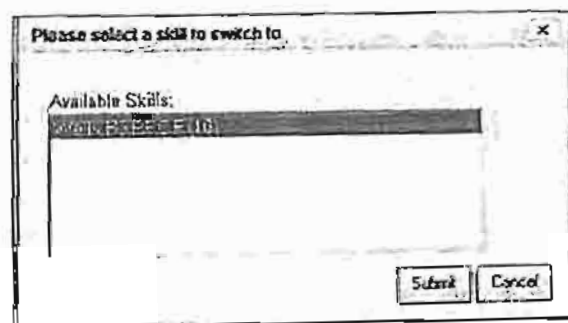
**Agents:** [Detail View](#) [Graphical View](#) [SQL](#) **Total Agents: 6**

| Sub Agent | Login ID  | Name     | State    | Account | Current Queue | Queue Position | Duration |
|-----------|-----------|----------|----------|---------|---------------|----------------|----------|
| Agent 1   | 123456789 | John Doe | NOTREADY |         |               |                | 00:04:58 |
| Agent 2   | 123456789 | John Doe | NOTREADY |         |               |                | 00:15:41 |
| Agent 3   | 123456789 | John Doe | READY    |         |               |                | 00:03:15 |
| Agent 4   | 123456789 | John Doe | READY    |         |               |                | 00:02:48 |
| Agent 5   | 123456789 | John Doe | READY    |         |               |                | 00:01:12 |
| Agent 6   | 123456789 | John Doe | READY    |         |               |                | 00:01:05 |

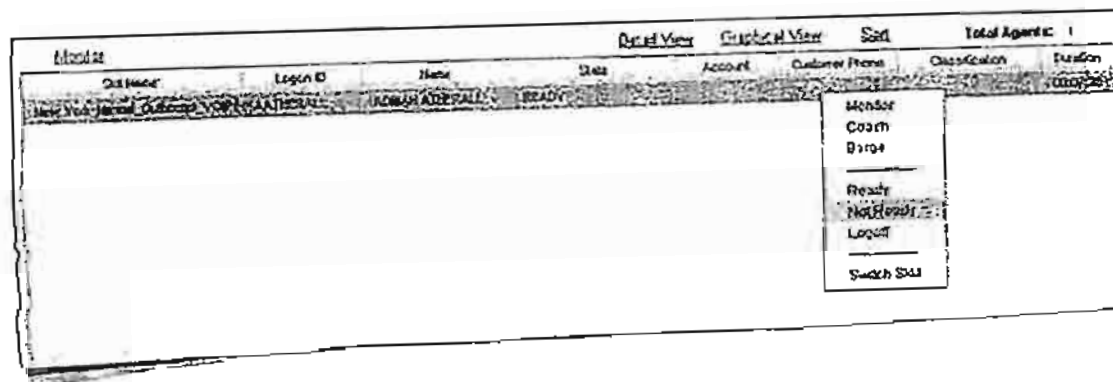
**FAQ - Agent Queue Management:**

- What status are the agents in?
  - The 'State' column will tell you the current status of an agent. Available statuses are:
    - **READY** – Agent is idle and ready to receive calls
    - **NOTREADY** – Agent is currently in a "break" status and is not able to receive calls. Outlined below are available Not Ready reason codes that can be activated upon request. This is a standard set that cannot be edited.
      - Lunch
      - Training
      - Break
      - Meeting
      - Tech
      - Difficulties
      - Other
    - **INCALL** – Agent is currently on an active call.
    - **WRAPUP** – Agent has completed active call, is currently in wrapup state. The maximum wrapup time can be implemented and adjusted for each individual agent.

- PREVIEW DIALING - Agent is in Preview Dialing mode with the option to dial, skip, or enter and dial another phone number manually.
  - INCALL (Inbound) - Agent is currently on an active inbound call.
- Are they in a status that would enable them to receive a LiveVox call?
    - Agents can only receive a LiveVox call if they are in a "Ready" status
    - The system will only make outbound calls based upon the number of agents in a "Ready" status.
  - How long have they been in any given status?
    - The duration column will show you how long an agent has been in their current status.
  - Managers have the ability to switch an agent from one skill to another.
    - If the agent is in "READY" or "NOTREADY" state, then the agent is immediately switched to the new skill.
    - If the agent is in any other state, then the request is queued and the agent is switched to the new skill after changing to "READY" or "NOT READY".
    - Can be done by right clicking on the agent in the ACD screen and choosing "Switch Skill" (see Agent Queue screen shot above).
    - Choose the skill that you would like to switch the agent to and click on 'Submit'.



- The agent will receive a screen pop advising of the switch. The agent will need to follow the directions on the screen. Once completed, the agent will be logged into the new skill.
- Managers are able to change the states of agents currently in "Ready", "Not Ready" or "Wrap up" states.
  - From "Ready" to "Not Ready" or "Logoff"
  - From "Not Ready" to "Ready" or "Logoff"







### 11.3.2 Agent Queue - LiveVox Voice Portal

Page 3 of 3

- o A validation step is available to confirm the change of the agent state. Please review the highlighted agent before clicking 'OK' to ensure changes are applied to the correct agent. Once a change is made, the new state of the agent will be displayed in the ACD queue.

#### Related Topics

ACD Queues

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PA118

### **AGENT MONITORING**

Agent monitoring enables managers to listen to a call in real-time as well as interact with the agent and/or customer. This feature applies to all ACD skills and consists of three different modes:

- **Monitor**
  - Allows for one way voice monitoring of an agent by a manager.
- **Coach**
  - Allows for one way voice monitoring with "coaching" from manager.
  - Manager can interject advice/guidance to the agent without other party hearing the conversation.
- **Barge**
  - Allows manager to conference into a conversation with an agent and caller without any interaction/initiation from the agent.

#### **Related Topics**

**ACD Queues**

---

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**ACCESSING THE AGENT MONITORING SUITE**

- To use the monitor, coach and barge functionalities, the connection to the manager's phone must be established by clicking the monitor link on ACD queue page.

|                               |                   |          |                   |          |                    |          |                   |          |
|-------------------------------|-------------------|----------|-------------------|----------|--------------------|----------|-------------------|----------|
| <u>Held Queue Summary:</u>    | Calls on Hold:    | 0        | Top Hold Time:    | 01:00:00 |                    |          |                   |          |
| <u>Avg Agent Queue Times:</u> | Avg Waiting Time: | 00:00:29 | Avg Talking Time: | 00:00:00 | Avg Waitplus Time: | 00:00:00 | Avg Unavail Time: | 00:00:00 |
| <u>Last 30 Minutes:</u>       | Avg Waiting Time: | 00:01:17 | Avg Talking Time: | 00:00:06 | Avg Waitplus Time: | 00:01:23 | Avg Unavail Time: | 00:00:34 |

|                                  |                    |                       |              |                 |                       |                    |                 |  |
|----------------------------------|--------------------|-----------------------|--------------|-----------------|-----------------------|--------------------|-----------------|--|
| <u>Monitor</u>                   | <u>Detail View</u> | <u>Graphical View</u> | <u>Sort</u>  | Total Agents: 1 |                       |                    |                 |  |
| <u>Full Name</u>                 | <u>Login ID</u>    | <u>Name</u>           | <u>State</u> | <u>Account</u>  | <u>Customer Phone</u> | <u>Destination</u> | <u>Duration</u> |  |
| New York Avenue Customer Support | ANTHONY            | ANTHONY               | READY        |                 |                       |                    | 00:00:00        |  |

- This brings up a dialog box to enter your DID and extension if needed. This phone/extension will receive a call stating, "This is a LiveVox call."



*Do not include special characters in the phone number. For instance, (888) 555-1212 would be 8885551212.*

| <b>Monitor</b>                   | <b>Detail View</b> | <b>Graphical View</b> |
|----------------------------------|--------------------|-----------------------|
| Full Name                        | Login ID           | Extension             |
| New York Avenue Customer Support | ANTHONY            |                       |

Enter Phone number

Phone Number:

Extension:

- From this point, right click on the agent you'd like to monitor, coach or barge, select the desired action, and wait for the dialog box to confirm.

| <b>Monitor</b>                   | <b>Detail View</b> | <b>Graphical View</b> | <b>Sort</b> | <b>Total Agents:</b> | 1              |             |          |
|----------------------------------|--------------------|-----------------------|-------------|----------------------|----------------|-------------|----------|
| Full Name                        | Login ID           | Name                  | Status      | Account              | Customer Phone | Destination | Duration |
| New York Avenue Customer Support | ANTHONY            | ANTHONY               | READY       |                      |                |             | 00:00:00 |

Monitor

Coach

Barge

---

Ready

Not Ready

Logout

---

Switch SW

- From there, click 'OK' to confirm your selection.
- Once you establish your monitoring audio path you can select other agents to monitor by right

#### 11.3.4 Accessing the Agent Monitoring Suite - LiveVox Voice Portal

Page 2 of 2

clicking on the other agent and choosing the desired monitor action.

- If you hang up your monitoring audio path the monitoring session will end.
- An agent who is under one of the types of monitoring will have their highlighted background on the ACD queue turn a light green color and the agent's ID will be underlined.

#### **Related Topics**

[ACD Queues](#)

---

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PA121

**AGENT MONITORING BY CLIENT AUDITORS**

Client Auditors (see user roles section 13 for more information) may also monitor live agents. Here are the permissions for Client Auditors:

| Permissions  | Client Auditors |
|--------------|-----------------|
| Monitor      | Yes             |
| Coach        | No              |
| Barge        | No              |
| Ready        | No              |
| Not Ready    | No              |
| Log Off      | No              |
| Switch Skill | No              |

**Related Topics**

ACD Queues

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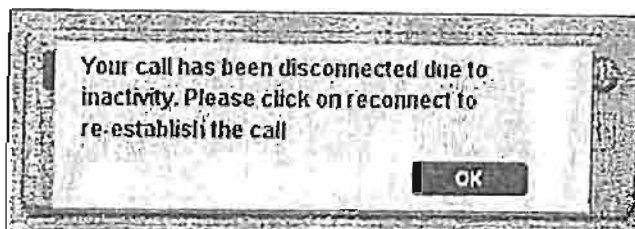
## 11.3.6 Managing Agent Inactivity - LiveVox Voice Portal

Page 1 of 2

**MANAGING AGENT INACTIVITY**

After a predefined, non-configurable period agents in a "Not Ready" state will be logged off (audio disconnected) in skills with constant agent audio path connections. This period is 10 minutes for agents logged in via traditional phone lines and 120 minutes for VoIP connections.

- Agents are presented with the following message that indicates they have been disconnected due to "inactivity":



- Agents are presented with the instructions to call back in to re-establish connection or logoff using the 'Logoff' button.
- 'Logoff' button takes the agent back to the Agent login page:



After being disconnected the manager's ACD screen shows the agent as "Not Ready"

- Manager's ACD screen prior to the agent being disconnected:

| <b>Hold Queue Summary:</b>  | Calls on Hold:    | 0           | Top Hold Time:    | 00:00:00 |                  |             |                   |          |
|---|-------------------|-------------|-------------------|----------|------------------|-------------|-------------------|----------|
| <b>Avg Agent Queue Times:</b>   | Avg Waiting Time: | 00:00:00    | Avg Talking Time: | 00:01:24 | Avg Waitup Time: | 00:00:00    | Avg Unavail Time: | 00:03:47 |
| <b>Last 30 Minutes:</b>   | Avg Waiting Time: | 00:02:57    | Avg Talking Time: | 00:00:00 | Avg Waitup Time: | 00:01:30    | Avg Unavail Time: | 00:00:35 |
| <div> <a href="#">Monitor</a> <a href="#">Detail View</a> <a href="#">Graphical View</a> <a href="#">Sort</a> <span>Total Agents: 2</span> </div> |                   |             |                   |          |                  |             |                   |          |
| Sub Name  | Login ID          | Name        | State             | Account  | Customer Phone   | Description | Duration          |          |
| ADWTS_F5_Agent_Desktop (1)  | LV_JOSE           | JOSE GARCIA | NOTREADY (agent)  |          |                  |             | 00:03:47          |          |

**Related Topics**

[ACD Queues](#)

PA123

### 11.3.6 Managing Agent Inactivity - LiveVox Voice Portal

Page 2 of 2

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PA124

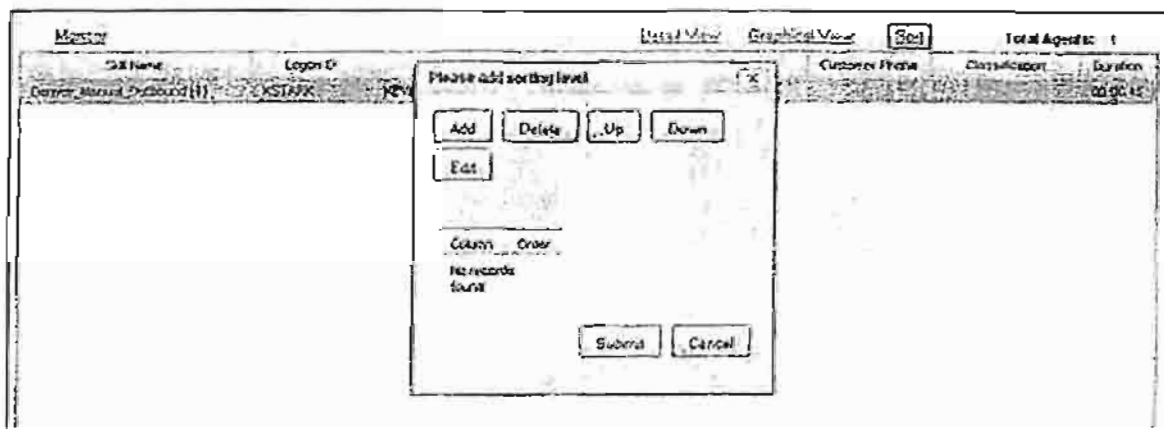




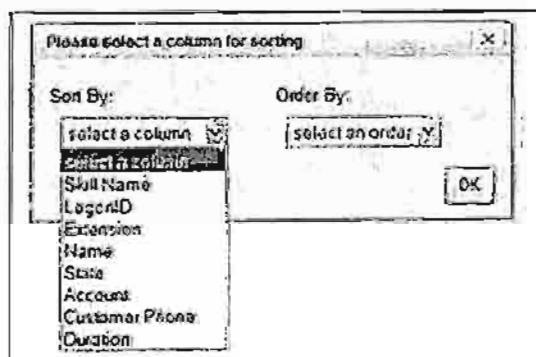
**SORT ACD QUEUE**

This feature enables multi-level sorting on an ACD queue by managers via a link. Managers can sort any of the columns in the ACD queue in ascending or descending order.

- To access this feature select the 'Sort' link in the ACD queue screen. This will cause a screen pop with a list of sorting templates and the ACD queue sort interface.



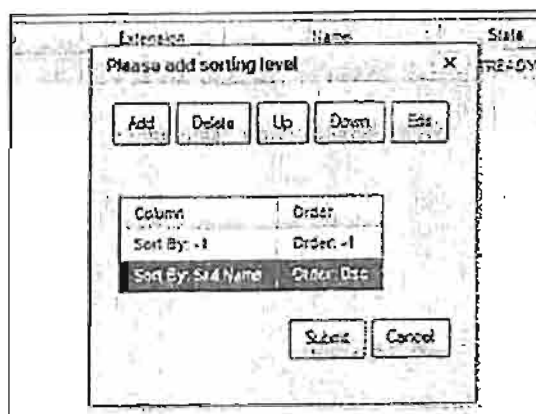
- Click the 'Add' button to create sorting templates. Users are prompted with a list of sorting options. After selecting a 'Sort by' option, users may select ascending or descending order from the 'Order By' dropdown menu. Click 'OK' to return to the sorting interface and a new template with the options selected will be listed.



- The 'Up' and 'Down' buttons allow user to move up or down sorting templates. Users may also delete or edit them.

## 11.3.8 Sort ACD Queue - LiveVox Voice Portal

Page 2 of 3



- To apply a sorting template, select the template and click 'Submit.'

PA127

### 11.3.8 Sort ACD Queue - LiveVox Voice Portal

Page 3 of 3

#### **Related Topics**

[ACD Queues](#)

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PA128



## DNC CATEGORIES

- **Permanent DNC** – will add phone #, account # and/or zip code to the permanent DNC list. The number cannot be called until the entry is manually removed – see section 12.3.
  - Phone
  - Account
  - Zip
- **Daily DNC** – this will place a DNC on phone #, account # and/or zip code for the remainder of that day's dialing period.
  - Phone
  - Account
  - Zip

The screenshot below is the example of the DNC filter/search, and Add New Entry/File user interface.

Filter/Search interface allows you to search for specific DNC files based on phone number and skill. You may select one or more skills to filter information.

## Related Topics

[DNC Lists](#)

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## ADDING A DNC ENTRY - TWO OPTIONS: ENTRY OR FILE

- **Entry** – enter the phone number in the Entry field and click 'Add'.
  - To make the entry skill specific, select the skill name from the 'Skills' list as shown below.
    - Skills based DNC is enabled by default for daily phone DNC entries. You need to request this option to be enabled for other DNC categories.



Phone numbers may be entered with or without dashes through the dialog.

- **File** – upload a list of numbers. In the box titled 'File', browse to your file and click 'Add'.



File should be a text file, 1 phone number per record/line. Example below:

Related Topics

12.2 Adding a DNC Entry - Two Options: Entry or File - LiveVox Voice Portal

Page 2 of 2

DNC Lists

---

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PA132



## DELETING A DNC ENTRY

Click on 'delete' to the right of the phone number you wish to remove from the DNC list.

| Phone      | Delete                 |
|------------|------------------------|
| 5103516642 | <a href="#">delete</a> |
| 9255954457 | <a href="#">delete</a> |

### Related Topics

[DNC Lists](#)

---

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## DO NOT CALL LIST (DNC) UPDATED BASED ON CALL DISPOSITION

This optional feature facilitates the process of adding data to the DNC list. When an agent selects a termination code set for DNC insertion, the system will enter the account number or phone number into the permanent or daily DNC list.



*Customers can specify during the setup whether the phone or account number, or both, need to be added into DNC.*

**12.4 Do Not Call List (DNC) updated based on Call Disposition - LiveVox Voice Portal** **Page 2 of 3**

12.4 Do Not Call List (DNC) updated based on Call Disposition - LiveVox Voice Portal Page 3 of 3

**Related Topics**

**DNC Lists**

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PA136

## **OPTIONAL FEATURES IN AGENT DESKTOP (NEED TO BE ENABLED)**

---

LiveVox offers optional additional features on the Agent Desktop. These features are client specific. Check with your supervisor to verify if they are enabled.

This section covers the optional features in the LiveVox Agent Desktop:

- Manual Dialing
- Dynamic Preview Dialing
- Break Codes
- Promise to Pay (PTP) termination code rules
- Agent Volume Control
- Agent Notes
- Call Recording
- Call Transferring
- Scheduled Callbacks
- Call Script Support

### **Related Topics**

[Manual Dialing](#)

[Preview Dialing](#)

[Break Codes and Status Update](#)

[Promise to Pay Termination Codes](#)

[Agent Volume Control](#)

[Agent Notes](#)

[Call Recording](#)

[Call Transferring](#)

[Scheduled Callbacks](#)

[Call Script Support](#)

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## MANUAL DIALING

The LiveVox Agent Desktop allows you to manually enter a phone number and launch a call by using one of the Manual dial skills. No input file with preloaded phone numbers is required – you select the number to dial using an on-screen dialing pad after logging into the skill. To use Manual dialing:

- Login from the agent login site selecting a Manual skill from the skill dropdown menu.


Agent Login

Login ID:

Password:

Skill:

Phone/Extension:

- Once you are logged into a Manual skill, a manual dialing pad is displayed.
- After going into "Ready" status, you can input a 10 digit number and click  to launch the call, as shown in the screen below. It is not necessary to put a 1 before the phone number.

Ready 00:03:45

Skill 1-Manual - Active, Campaign 1-14

Enter Phone Number

1 2 3

4 5 6

7 8 9

\* 0+ Clear

- You will then see a screen pop with a successful call launch message.



- When a call is connected, it will immediately be bridged to you.
- After ending the call, you will go into "Wrap Up" mode and be able to select the appropriate termination code.



*Please note that Manual skills do not consider numbers in your Do Not Call list when determining if a number can dial in the Manual skill.*

#### Related Topics

[Optional Features in Agent Desktop \(need to be enabled\)](#)

[Dialing Status and Failure Information Available with Manual Skills](#)

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## 16.1.1 Dialing Status and Failure Information Available with Manual Skills - LiveVox Vo... Page 1 of 3

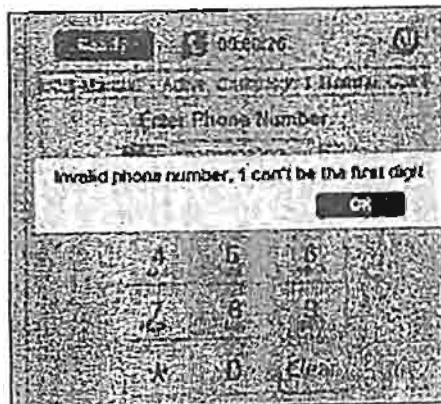
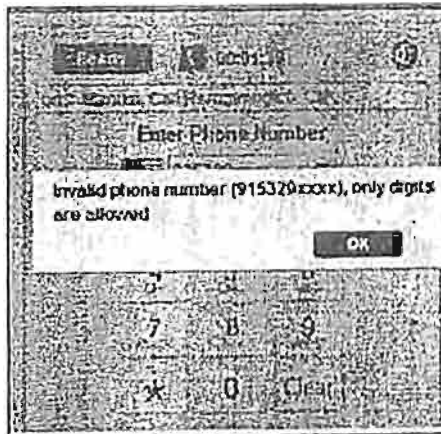
**DIALING STATUS AND FAILURE INFORMATION AVAILABLE WITH MANUAL SKILLS**

Additional information is available in Agent Desktop about the status of manually launched calls. When a call is launched, you will be notified if it was successful or if it failed and why. When a call fails, you may see the following error messages:

- "No answer" error



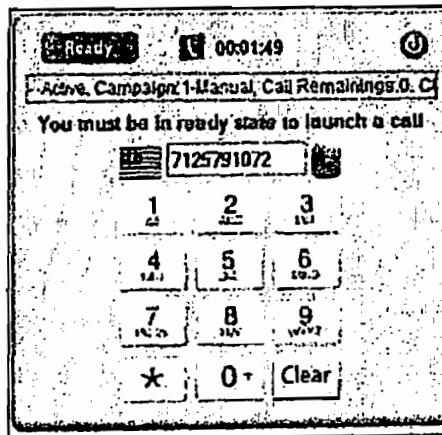
- "Bad number" error



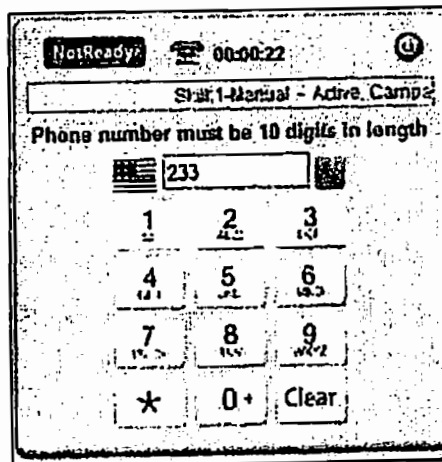


## 16.1.1 Dialing Status and Failure Information Available with Manual Skills - LiveVox Vo... Page 2 of 3

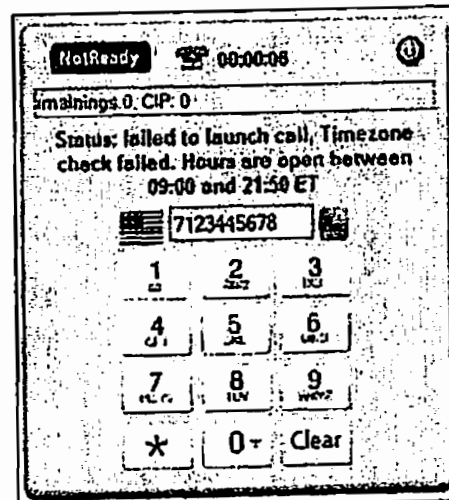
- "Agent in not ready state" error



- "Incomplete phone number" error



- "Attempted to dial outside of your site's dialing policy" error



16.1.1 Dialing Status and Failure Information Available with Manual Skills - LiveVox Vo... Page 3 of 3

**Related Topics**  
**Manual Dialing**

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## PREVIEW DIALING

The LiveVox Agent Desktop allows you to preview an account before dialing. The preview mode can be set to all phone numbers, or just for wireless numbers. This is controlled at the Skill level.

- When in preview mode, you are prompted with a preview dial screen pop that has account information as well as a "Skip", "Dial" or "Manual" (to manually dial a different number) buttons.

- Select **Dial** to dial the number on the screen.
- Select **Skip** to go to the next account.
- Select **Manual** to input any phone number and dial as you would with a Manual dial skill.



If "skip" is selected, the system will capture the outcome with the system code – "Preview Dial - Agent Skipped (Not Made)".

### Related Topics

[Optional Features in Agent Desktop \(need to be enabled\)](#)

[Preview Wireless Mode](#)

[Preview All Mode](#)

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### PREVIEW WIRELESS MODE

Once LiveVox identifies a wireless number, the system will switch from predictive dialing to the preview mode and you will see a screen that displays the cell phone number for you to dial to contact the customer. Once you dial or skip the number you will be returned to the predictive dialing queue.



The screenshot displays a software interface for 'Preview Wireless Mode'. At the top, there is a timer showing '00:00:23' and a status indicator '93.8 29025'. Below this, a form contains the following fields: 'ACCOUNT:' with value '3821673', 'PHONE NUMBER:' with a blurred value, 'NAME:' with a blurred value, 'NOTES 1:' with a blurred value, and 'NOTES 2:' with the value 'test'. A section titled 'Preview Dialing' is visible below the notes. At the bottom, there is a 'Phone number:' field containing '4053169697' and a 'Dial' button.

#### Related Topics

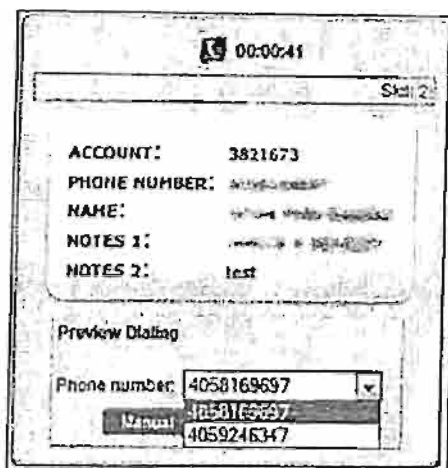
[Preview Dialing](#)

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### PREVIEW ALL MODE

This mode works the same as the wireless preview, except you will be presented with the list of all records for the account. You can select one to dial or skip.



Once "Skip" or "Dial" is executed, you will move to the next account. You will not be able to go back to the original drop down list and pick another number for the same account.

#### Related Topics

[Preview Dialing](#)

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## BREAK CODES AND STATUS UPDATE

You may use the **Ready** / **Not Ready** button when going to or returning from breaks.

- LiveVox provides a subset of six reasons, or break codes, for the "Not Ready" status. When you go into "Not Ready" status, you are prompted to select one of the following options:
  - Lunch
  - Training
  - Break
  - Meeting
  - Tech Difficulties
  - Other

- You may also see your status from the Agent Desktop. In the following example, the agent is in "Not Ready" status with "Meeting" selected as break code.

- You may select the specific "Not Ready" break code to go into from the termination code list upon finishing a call.

00:01:35

Skill/Quick Connect - Active, Ca

CALL TYPE: Outbound

FIRST NAME:

LAST NAME:

ACCOUNT NUMBER:

PHONE NUMBER: 6783734056

End Call

Transfer

Already Enrolled

DNC Request

DND Request - FAX

DND Request - Institution

DND Request - Retired

Hang Up

Ready (selected)

Lunch

Training

Break

Meeting

Tech Difficulties

Other

Save

Incorrect Grade

Looking for Employment

#### Related Topics

[Optional Features in Agent Desktop \(need to be enabled\)](#)

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## PROMISE TO PAY TERMINATION CODES

LiveVox is able to track and tally payments in real time through Promise to Pay (PTP) termination codes. If you select any of the PTP codes, you will be prompted to enter a payment amount in the "Payment Amount" field in dollars and cents.

Phone Dialed: 7125791072  
test ::

**Agent Hung Up**

- ☐ Agent Hung Up
- ☐ Call Back
- ☐ Customer Hung Up
- ☐ Deceased
- ☐ DNIC

**Wrong Number**

- ☐ Third Party
- ☐ Wrong Number
- ☐ Wrong Party

**PTP**

- ☐ Attorney Handling
- ☐ Bankrupt
- ☐ Debtor Dispute
- ☐ Left Message Person
- ☐ PTP Arranged
- ☐ PTP by Mail
- ☐ PTP Credit Card
- ☐ PTP Direct Check
- ☐ PTP Fast Pay

Payment \$0.00

☐ Ready

☐ Not Ready **Next**

☐ PTP Payment in Full

☐ Refused to Pay

☐ Dead Air

- When selecting a PTP termination code, if you do not enter an amount you will get the following error message to enter an amount greater than zero.



# 16.4 Promise to Pay Termination Codes - LiveVox Voice Portal

Page 2 of 2

Phone Dated: 1/25/2012

Last: [Field]

First: [Field]

☐ Ready

☐ Not Ready

Payment amount must be greater than zero

OK

PTP Payment in Full

Refused to Pay

Dead Air


## Related Topics

[Optional Features in Agent Desktop \(need to be enabled\)](#)

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## AGENT VOLUME CONTROL


You may adjust volume levels from the Agent Desktop by changing the settings for "Audio In" and "Audio Out". When enabled, it will show on the pop-up while you are in while you are "In Call" status.

- Click  to access the agent volume control levels.



- In the Volume Control UI, the headset adjusts your volume, and the microphone adjusts the volume of the customer.



- Click  once you have finished updating the settings.


### Related Topics

[Optional Features in Agent Desktop \(need to be enabled\)](#)

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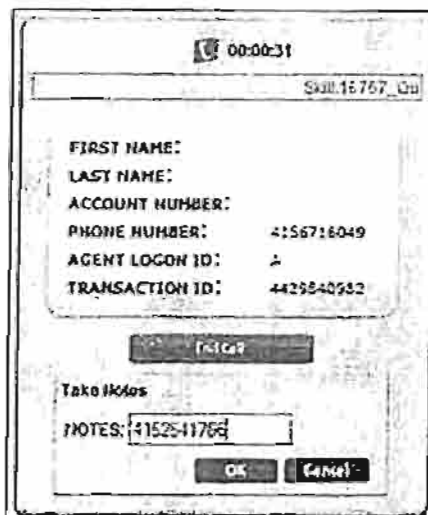
## AGENT NOTES


You may enter free form notes from the Agent Desktop. When enabled, it will show on the pop-up while you are in "In Call" or "Wrap up" status.

- Click  to access the agent free form notes UI.



- You will be presented with the below screen where you may input any useful information in the "Notes" text box.



- Click  once you have finished entering information.



*Note field is a free form field. It is limited to 200 characters and/or spaces and only works on skills where an Account Number is provided.*

### Related Topics

[Optional Features in Agent Desktop \(need to be enabled\)](#)

## CALL RECORDING

Call Recording allows your calls to be recorded. Call Recording begins at the moment a call is bridged to you, and stops when you or the customer ends the call.

### Related Topics

[Optional Features in Agent Desktop \(need to be enabled\)](#)

[Pause Call Recording](#)

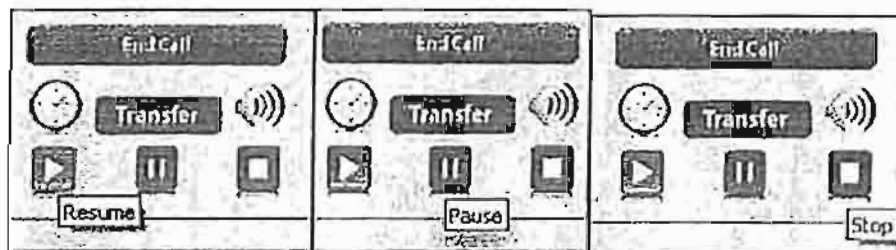
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### PAUSE CALL RECORDING

You may pause call recording from the Agent Desktop. When enabled, the recording controls will show on the Agent Desktop screen while you are "In Call" status.

- While "In Call" status, you will see the   and  buttons as shown below. The recording is turned on automatically upon connecting to the call. If call ends with call recording paused, the recording will automatically reinitiate on the next call.



#### Related Topics

[Call Recording](#)

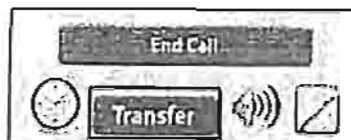
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## CALL TRANSFERRING

You can transfer calls within the LiveVox Agent Desktop.

- When enabled, the transfer option will appear on your screen while you are "In Call" status.
- Click **Transfer** to access the call transfer menu.



- You will see different transferring options. You may select one of the following transferring options by clicking the specific icon for each option:
  -  Manual: Enter a number with or without extension to transfer the call.
  -  Agent: Select a specific agent from a drop-down menu to transfer the call.
  -  Phone Book: Select frequently used number from a drop-down menu to transfer the call.

### Related Topics

[Optional Features in Agent Desktop \(need to be enabled\)](#)

[Manual Transfer](#)

[Agent to Agent Transfer](#)

[Frequently Dialed Numbers Phonebook](#)

[Handling Call Transfers](#)

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